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ABSTRACT

This training program is a model for recruiting and training counselors to address the career development and educational planning needs of current employees. Section A is directed to the instructor who will train counselors to provide career development assistance to employees of an organization. It describes the program concept and discusses marketing certified counselors; workshop process; and use of the training materials. Section B is directed to the counselor trainees. Seven modules are grouped into three categories: program initiation and goal setting (program intake, employee assessment, employee career planning); program and service referral (employee referral and follow-up, employability skill development options); and program operation and evaluation (client and counselor program evaluation, program operation strategies). Each module leads to the acquisition of three or four competencies. The standard format for each module is as follows: an information sheet that presents the goal and an outline of the competencies thought critical to achieving this goal; overview that describes the purpose and content of the competency to be addressed; learning experiences with objective, review to demonstrate understanding of the competency, activity, and checklist; evaluation; and references. All necessary exhibits and worksheets are provided. (YLB)

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# EMPLOYEE UPGRADING FOR A QUALITY WORKFORCE

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# FOREWORD

As more adults are in need of assistance with their career transitions and planning, certified counselors, with their years of training and experience, are in a position to provide such employee assistance to business, industry, and labor organizations. A quality work force is something our country needs as well as our country's employers desire to achieve. With proper guidance, today's workers can acquire skills that will assure their transitions caused by job changes, workplace requirements, and life situations will be positive and result in greater productivity, quality of work, and worker satisfaction.

Within these employee assistance programs is the intent that affected employees have access to professional career counseling, assessment and educational planning to assure that employee skill renewal plans are realistic for both the employer but also the individual. It has also been expressed that its their intent to use public vocational education secondary and post secondary institutions and their staff to provide both the needed guidance, assessment, educational planning and skill training.

This study and product development effort was based largely on the premise that there already exists the skilled counselors and tested training methods to respond to the needs of the labor and management within large and minimum sized United States firms. To this end we studied the specific employee assistance needs that exist and used these characteristics as a template for training program development. Likewise, realizing that there are over 60,000 professional certified counselors across the country in our public institutions a plan to recruit and retrain them was developed. This Nationwide counseling capacity and skill renewal opportunities for them to become partners in resolving the needs of labor and management is the outcome of this effort.

It is believed that as a result of using this product in a systematic way, a true partnership between industry, business and labor will result. This partnership will make employees educational planning and skill building more systematic, time efficient and cost effective. In addition, Public Vocational Education institutional capacity will be more fully utilized and directed towards the needs of tomorrow's work force.

The National Center for Research in Vocational Education offers the Employee Upgrading for a Quality Workforce training program as a means of preparing counselors to serve the career development and educational planning needs of adults who are currently employed.

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Special recognition is due to the following National Center staff who played major individual roles in the development of this document: Harry N. Drier, Project Director, for leadership and direction of the project; Louise Vetter and Robert Bhaerman, for writing counselor-specific materials; Bettina Lankard, for compiling information and writing; Charles Ryan, for writing assistance, Beverly Haynes, Mary LaBelle, Colleen Kinzelman and June Breen for word processing the documents. Appreciation is extended to the National Center editorial and media services personnel for editorial review and production of the document.

Ray D. Ryan
Executive Director
The National Center for Research
in Vocational Education

## EXECUTIVE SUMMARY

The Employee Upgrading for a Quality Work Force training program serves as a model for recruiting and training counselors to address the career development and educational planning needs of current employees. It is an age-old saying that "nothing remains the same." Our society is continually changing--people's needs and wants change, businesses change the direction of their efforts, companies merge and/or acquire other companies resulting in altered job descriptions and responsibilities. The employees of an organization feel the effects of such changes in their occupational as well as personal lives.

Coping with change is not a skill that is acquired naturally. But, there are processes that can provide the basis for such skill development, more specifically, in managing career transitions necessitated by "change." The purpose of this program is to recruit and train counselors to help employees through their career transitions--to provide strategies for counseling employees through the process and program materials such as guidelines, worksheets, and so forth for use with the employees.

Section One of the Employee Upgrading for a Quality Work Force training program is directed to the Instructor who will train counselors to use their professional expertise to provide career development assistance to employees of an organization. This section will focus on the process instructors will follow to conduct the training and to use the training materials provided in this program.

Section Two is directed to the counselor trainees who will eventually provide employee assistance in career transition within the workplace. This section contains seven training modules which focus on program initiation and goal setting, program and service referral, and program evaluation. Each module contains an Introduction which describes the organization of the module and the competencies to be addressed. Specific information and activities to help trainees develop the skills required to provide employee assistance in career development are included in each training module.

The Appendix contains materials--guidelines, worksheets, etc. --that can be used by counselors to establish their individual counseling approaches and to offer assitance to their clients--the employees.

It is suggested that this training program take approximately three days for experienced counselors to complete. Based upon trainee competency pre-test, time on competency will be modified to allow for as much customization as possible.

# SECTION A

# TRAINER GUIDELINES

## PROGRAM CONCEPT

In order for industry and labor to take advantage of this counselor training program for providing career development services to employees, there needs to be in place a trained, certified, and committed cadre of professional counselors. These counselors are within existing high school, community college and university settings and will be called upon to serve as the primary counseling staff. Eventually, a small cadre of certified counselors need to be available in all communities where there are industry and business employers who would use these trained counselors for internal assessment. counseling and training plan development and implementation. Ideally, through training and certification, a registry of available counselors will be available on a state and local level. Figure #1 depicts a suggested operational design and the following will define more specifically each phase.

In order to achieve the ideal goals of this project, the following issues need to be addressed;

1. Market the training, certification and counseling opportunities for industry
2. Establish a system of training facilities, workshops and trainers within each state
3. Develop a counselor certification process
4. Develop a certified counselor registry information and management system
5. Develop a contract work agreement for use between management and labor, and either the industrial counselor or counselor's employing institution

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## Marketing the Training, Certification, and Employee Assistance Counseling Opportunities within Industry

### Marketing the System

There are several sectors that need to be involved in order for this training and counseling assistance to become credible and institutionalized nationally.

First, the counseling related associations and agencies will see the employee assistance counseling opportunity as an acceptable and professional enriching training experience. Figure 2 suggests the groups that will be involved in both the acceptance and marketing of the program.

### Counselor Recruitment/Institutional Agreements

On the state basis there are several ways of recruiting institutions and individuals for program involvement. The following are some suggested ways.

1 The sponsor might provide with "external funding" a "train the trainers" workshop opportunity for state professionals.

2. After a formal set of agreements with state agencies/groups has been established, a state mailing will be conducted. In this mailing a full description of the employee assistance counseling program will be announced. All specifics will be presented in terms of how people become trained, institutional agreements, commitment expectations on the part of the counselors and institutions, etc.

   This mailing will go to school district superintendents and community college presidents requesting that they consider being involved, and provide nominations of one-two of their counselors.

3. For those institutions who request involvement, a program institutional agreement will be sent for review and signature. This agreement will underscore the time, activity and cost/payment options and staff involved.

4. For those institutions who sign and return the agreement and provide counselor's names, a second follow-up will occur.

   This follow-up correspondence will go directly to the nominated counselors. Full specifics of the opportunity will be presented and an announcement of the next training event will be included.

5. For those counselors who accept the training opportunity, a personal invitation to a 3-day training event for certification will be sent.

6. Those in the first workshop will represent the beginning of a state counselor program registry.

7. Based upon regional needs within the state, additional marketing, recruitment, and training could be scheduled.

## Relationships with State Groups

There are at least seven (7) agencies or organizations that individually or collaboratively could help manage and operate a state training and counseling employee assistance program for business and industry such as:

1. State Departments of Education - Guidance Division
2. State Branches of NCDA, AACD, ACES, ASCA, and AVA Guidance Division i.e. SOICC (State Occupational Information Coordinating Committee).

Any one of these groups, along with one or more of the others, could serve as lead agency(s) for statewide promotion, administration, training administration, and certification.

The purpose of such state relationships is to assist the agency that is administering this program to do the following:

1. Adopt the training and employee assistance program as a legitimate function and activity of the organization
2. Help fund some aspect of the training effort
3. Provide CEUs of other kinds of credit for local, state, or national certification

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4. Announce the availability of the training and counseling opportunity, and their role in the project

5. Assist in the scheduling of facilities for state workshops

6. Consider incorporating this training into their conference/convention programming

7. Help monitor the training and service effectiveness

8. Provide individuals to be trained as lead state trainers

9. Help establish and operate the certified trainer registry

10. Help publish articles on activities, opportunities and success stories

## Marketing Certified Counselors

The success of this proposed employee assistance counseling and educational planning program utilizing public institution counselors depends upon industry and labors understanding what the program can do, its availability and under what conditions. It's proposed that the administering agency, in collaboration with state/national counseling groups or agencies, conduct the following:

### Within State

1. Identify those companies and organized labor groups that may have need or interest in contracting for employee assistance counseling. The primary factors will be as follows:
   a. Industry with sufficient human resource pool
   b. Industry that has set-aside, and has available, a training fund
   c. Industry that is either facing (1) internal employee shifts due to technology changes, (2) plant closing, or (3) plant restructuring

2. A customized letter with program brochure will be developed and sent to the head of the firm's employee assistance program

3. Those industries that respond favorably will be invited to meet with the administering agency staff to discuss details of possible participation

4. For those industries/labor groups that show interest, a specialized agreement will be developed which points out the conditions of an annual arrangement including such points as follow:

   a. Number and type of employees to be served
   b. Availability of time in plant for counseling and assessment
   c. Funds available per employee
   d. Set of expectations
   e. Establish protocol points and individuals
   f. Fiscal arrangements and responsibilities
   g. Reporting procedures
   h. Facility arrangements

For those companies who have plants/offices in more than one state, a special marketing and program marketing approach will be use.

Basically, the approach will be to develop operational agreements with corporate offices (central) that will allow for multi-state training and counseling activities.

1. Multi-state corporations will be identified that have employee assistance programs and potential interest in obtaining third party assistance.

2. Individual correspondence (telephone) will be conducted by administering agency leadership.

3. Meetings will be scheduled with corporate employee assistance and/or labor leadership.

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## TRAINING PACKAGE OUTLINE

This training package consists of seven modules grouped into three categories as follows:

Program Initiation and Goal Setting

1. Program Intake
2. Employee Assessment
3. Employee Career Planning

Program and Service Referral

4. Employee Referral and Followup
5. Employability Skill Development Options

Program Operation and Evaluation

6. Client and Counselor Program Evaluation
7. Program Operation Strategies

In addition to the seven modules, the training package includes the following:

- Participant Self-Assessment Questionnaire
- Trainer's Assessment Questionnaire
- Summary Data Sheet
- Performance Indicators
- References

Each of the training modules will lead to the acquisition of three or four competencies by participating counselors. The specified competencies for each module are listed below:

## Program Intake Module

Competency #1: Prepare an agenda for the intake interview, identifying guidelines for counselor/employee interactions and listing the interview topics and the sequence in which the topics are to be presented.

Competency #2: Choose or design an intake form to gather demographic and other relevant data from the organization's employees.

Competency #3: Develop a voluntary system for acquiring and recording employee medical, education, and employment records.

Competency #4: Prepare a presentation to orient the employee to the program's set of services, goals and objectives, schedules, and counselor/employee responsibilities.

## Employ Assessment Module

Competency #1: Design an assessment plan that details the scope of the assessment effort and the employee characteristics and needs to be assessed through the program.

Competency #2: Select the most appropriate methods of informal assessment to use in an organizational setting and describe the benefits of each.

Competency #3: Select, modify, or develop appropriate formal assessment instruments, including any instruction sheets that will be required to complete the instruments correctly.

Competency #4 Specify how information and data collected form each selected method of assessment will be analyzed and communicated to the employee.

## Employee Career Planning Module

Competency #1: Select activities to help employees develop self-awareness of career-related values, interests, and skills.

Competency #2: Select and develop activities to promote occupational exploration.

Competency #3: Establish a plan for helping employees develop decision-making skills.

Competency #4: Outline a strategy for developing employees' Employability Development Plans.

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### Employee Referral and Follow Up Module

Competency #1: Using a referral process for referring employees to internal and external career guidance services.
Competency #2: Using a career planning sheet with adults planning for career transitions.
Competency #3: Using career referral techniques for adults seeking training, counseling and/or special services.
Competency #4: Using follow-up procedures for assessing the extent of follow-through activities performed by each client.

### Employability Skill and Development Module

Competency #1: Specify learning, work maturity, and job search skills necessary to employees' success in the employment setting.
Competency #2: Identify and describe the use of resources to help employees develop learning, work maturity, and job search skills.
Competency #3: Present plans for conducting workshops on study skills, work maturity skills, job search skills, and skills in selecting an educational institution.
Competency #4: Prepare a form to use in obtaining evaluation of the employability skill development.

### Client and Counselor Program Evaluation Module

Competency #1: Evaluating this employee assistance program element that focuses on job re-training.
Competency #2: Use client evaluation materials to determine what they have learned from the career assessment, counseling, and planning process.
Competency #3: Follow-up of employees with educational and occupational training agencies to determine what they did in seeking and acquiring training.

### Program Operation Strategies Module

Competency #1: Develop an individual consulting record keeping system.
Competency #2: Develop an individual consulting billing system.
Competency #3: Develop an agreement or contract document that could be used with EAP consultancies.

## "TRAIN THE TRAINERS" WORKSHOP PROCESS

Nationally recognized trainers will prepare the counselors (trainees) who will be certified as having completed the training for employee career development counselors. This group of nationally recognized trainers will participate in a "train the trainers" workshop to help ensure that the training received across the country by counselors is comparable.

A major task of the "train the trainers" workshop will be to develop specific facilitator outlines for each of the group activities suggested in the modules (see exhibit 1 for an example of such an outline). Additional activities may be suggested and developed as part of the "train the trainers" session. Further suggestions for evaluating the progress of participants may be developed as well.

The trainers group will review the status of policies for recruiting participants, scheduling training, making arrangements for the training, and so on. The more complete the specification of these policies can be made, the more likely that counselor training can proceed with ease.

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## Exhibit 1. Example of Facilitator's Outline

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COMPETENCY 1: Prepare an agenda for the intake interview, identifying guidelines for counselor/employee interactions and listing the interview topics and the sequence in which the topics are to be presented.

Group Activity: Prepare the agenda for the intake interview.

---

Facilitator's Outline Notes-Materials to use, etc.

---

A. Establish Activity

1 Indicate to participants that they will be learning about guidelines for counselor/employee interactions, interview topics, and sequencing.

2. Have participants read Competency 1 material or present the information to them.

B. Intake Interview Agenda

1. Brainstorm agenda topics, listing on chalkboard or newsprint.

2. Discuss pros and cons of including topics in the agendas, striking out those topics where consensus is that they are inappropriate.

3. Number remaining topics in sequence, as suggested by participants

4. Review developed outline against the sample intake agenda in the module.

# TRAINING WORKSHOP PREPARATION

The following listing provides reminders of tasks that need to be accomplished prior to the workshop.

- Coordinate with sponsor on scheduling facilities and inviting participants
- Review modules and select activities from those included in the modules or other appropriate activities from your repertoire (see Exhibit 1 for an overview of a possible 3-day training schedule)
- Notify participants of any materials they need to bring with them to the training event
- Determine most appropriate evaluation strategy for the learning activities selected for the training event (see Exhibit 2 for an example learning activity evaluation form)
- Assure that all needed materials for the training event are available in the numbers needed to provide each participant complete materials

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Exhibit 1. Overview of Possible Training Schedule

| | Day 1 | | Day 2 | | Day 3 |
|---|---|---|---|---|---|
| 8:30 | Registration | 8:30 | Employee Career Planning | 8:30 | Employability Skill Development Options |
| 9:00 | Welcome and Orientation | | | | |
| 9:30 | Program Intake | | | | |
| 12:00 | Lunch | 12:00 | Lunch | 12:00 | Lunch |
| 1:00 | Employee Assessment | 1:00 | Employee Referral and Followup | 1:00 | Client and Counselor Program Evaluation |
| | | | | 2:30 | Program Operation Strategies |
| 4:30 | Review and Preview Day 2 | 4:30 | Review and Preview Day 3 | 4:00 | Award Certificates of Completion |

## Exhibit 2. Evaluation Form Example

### Learning Activity X: Learning activity Evaluation

1. The content of this learning activity is very relevant for employee career development programs.

| | | | | |
|---|---|---|---|---|
| Strongly Agree | Agree | Not Sure | Disagree | Strongly Disagree |
| 5 | 4 | 3 | 2 | 1 |

2. The most important concept I learned in this activity was:

3. The concept I identified in item #2 will be very useful to me as an employee career development counselor.

| | | | | |
|---|---|---|---|---|
| Strongly Agree | Agree | Not Sure | Disagree | Strongly Disagree |
| 5 | 4 | 3 | 2 | 1 |

4. The instructional methods used in the activity were appropriate for the content of the activity.

| | | | | |
|---|---|---|---|---|
| Strongly Agree | Agree | Not Sure | Disagree | Strongly Disagree |
| 5 | 4 | 3 | 2 | 1 |

5. I can use the instructional method as an employee career development counselor

| | | | | |
|---|---|---|---|---|
| Strongly Agree | Agree | Not Sure | Disagree | Strongly Disagree |
| 5 | 4 | 3 | 2 | 1 |

6. How could the activity have been improved (in terms of content and method)

7. Additional Comments:

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## TRAINING WORKSHOP AGENDA

As the trainer, your role will be to facilitate the development of competencies by counselors in order for them to provide required quality level services in their assigned employee career development programs. Although each participant should have completed course work in career development (including adult development) and in testing in her/his background, you may want to do a preliminary assessment prior to or at the beginning of the workshop. Following this page is an example of a self reporting way for participants to judge their competence or knowledge of all training competencies.

You will also be able to provide opportunities for networking and linking across community agencies, services, and employers. This kind of background will be extremely valuable to the participants in their various roles in employee career development programs.

Be sure that evaluation forms are collecting during the workshop. The information provided will enable the developers to make appropriate revisions and insert appropriate new materials as they are identified. It's highly recommended that the trainer use the original Pre-Test as a post-test measure and learning level measurement.

## FOLLOW-UP

While not required, it is highly recommended that the Trainees provide the Administrating Agency post-workshop information and impressions on how the training could be improved.

EXHIBIT 3

**EVALUATION**

# PARTICIPANT SELF-ASSESSMENT QUESTIONNAIRE

1 Name (Optional) ______________________ 3 Date ______________________

2 Position Title ______________________ 4 Module Number ______________________

**Agency Setting**

Secondary School
Postsecondary School
College/University

JTPA
Veterans

Business/Industry
Management
Business/Industry/Labor

Municipal Office
Service Organization
State Government
Other

| **Workshop Topics**<br>By Competency Area | PREWORKSHOP NEED FOR TRAINING *Degree of Need* (circle one for each workshop topic) | | | | | POSTWORKSHOP MASTERY OF TOPICS *Degree of Mastery* (circle one for each workshop topic) | | | | |
|---|---|---|---|---|---|---|---|---|---|---|
| | None | Slight | Some | Much | Very Much | Not Taught | Little | Some | Good | Outstanding |
| 1. Understand the purpose and basic services offered in an employee assistance program. | 0 | 1 | 2 | 3 | 4 | 0 | 1 | 2 | 3 | 4 |
| 2. | 0 | 1 | 2 | 3 | 4 | 0 | 1 | 2 | 3 | 4 |
| 3. | 0 | 1 | 2 | 3 | 4 | 0 | 1 | 2 | 3 | 4 |
| 4. | 0 | 1 | 2 | 3 | 4 | 0 | 1 | 2 | 3 | 4 |
| 5. | 0 | 1 | 2 | 3 | 4 | 0 | 1 | 2 | 3 | 4 |
| 6. | | | | | | | | | | |
| 7. | 0 | 1 | 2 | 3 | 4 | 0 | 1 | 2 | 3 | 4 |

**Overall Assessment on Topic of** ______________
______________________________

**Comments:** ______________________________________________
______________________________________________
______________________________________________
______________________________________________
______________________________________________

# SECTION B

## EMPLOYEE UPGRADING FOR A QUALITY WORKFORCE

## A COUNSELOR TRAINING MODEL FOR INDUSTRY-BASED EMPLOYEE CAREER COUNSELING, GUIDANCE, AND ASSESSMENT

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# PROGRAM INITIATION AND GOAL SETTING

---

MODULES:

1. PROGRAM INTAKE
2. EMPLOYEE ASSESSMENT
3. EMPLOYEE CAREER PLANNING

---

## Program Intake

---

| | Goal |
|---|---|
| DESIGN AND IMPLEMENT AN EMPLOYEE PROGRAM INTAKE STRATEGY | After completing this module, career guidance personnel will be able to conduct an intake interview to gather information useful in program planning and to provide orientation to the career development and assistance program. |

---

| | |
|---|---|
| Competency #1: | Prepare an agenda for the intake interview, identifying guidelines for counselor/employee interactions and listing the interview topics and the sequence in which the topics are to be presented. |
| Competency #2: | Choose or design an intake form to gather demographic and other relevant data from the organization's employees. |
| Competency #3: | Develop a voluntary system for acquiring and recording employee medical, education, and employment records. |
| Competency #4: | Prepare a presentation to orient the employee to the program's set of services, goals and objectives, schedules, and counselor/employee responsibilities. |

---

There are typically two purposes for the intake step in employee career counseling programs: (1) the process of determining eligibility for, and completing entry into, the program and (2) the orientation to the program services. This module will provide the information and learning activities that will help counselors develop the critical competencies necessary to perform program intake activities for employees needing assistance.

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The standard format used in this and other modules for this program is as follows:

- About This Module: This section presents (1) the goal--a statement of what one should be able to accomplish by completing the module, and (2) an outline of the competencies thought to be most critical to achieving the goal.

- Overview: The overview offers an introduction to the topic and describes the purpose and content of the competency to be addressed.

- Learning Experiences: Each learning experience is designed to help users develop a specific competency. Within this section of the module are the following components:

  Objective: This statement describes the skills the trainee must be able to demonstrate at the conclusion of the learning experience.

  Review: This section includes individual exercises the trainees complete to demonstrate understanding of the competency. It also provides opportunities for immediate feedback regarding their understanding and progress.

  Activity: The activity is designed to engage the trainee in performing the tasks for which the competency is required. The suggested activities involve a blend of development, presentation, and "hands-on" participant activities, such as games and role playing.

  Checklist: The checklist is an itemized list of materials the trainee should have developed, acquired, and assembled through the learning experience.

- Evaluation: This section of each module contains information and instruments that can be used to measure what workshop participants need prior to training and what they have accomplished as a result of training. Included in this section are a Pre- and Post-Participant Assessment Questionnaire and a Trainer's Assessment Questionnaire.

- References. All major sources that were used to develop the module are listed in this section. Also, major materials resources that relate to the competencies presented in the module are described and characterized.

## Program Intake

---

| | |
|---|---|
| COMPETENCY #1 | **Prepare an agenda for the intake interview, identifying guidelines for counselor/employee interactions and listing the interview topics and the sequence in which the topics are to be presented.** |

---

The intake process typically begins with an interview between the counselor and the employee who will be entering the program. This initial interview should be introductory rather than fact-finding in nature and should take approximately 15-20 minutes, with additional time alloted for the employee to complete the paper work. It should begin with a welcome to the employee and a brief description of the purpose of the career development and assistance program and of the counseling interview process itself.

The primary purpose of this interview should be to build employee/counselor rapport so that the ensuing counseling sessions and guidance activities will be well received. In order for a positive relationship to develop, the employee must perceive the counselor as possessing certain qualities. First of all, the counselor's interest in the employee must be seen as genuine and sincere. Secondly, the counselor must be viewed as an able technician and a competent person. Both of these characteristics will be evident if the relationship on the counselor's part is based on the following conditions: acceptance, empathy, understanding, trust, and respect.

- o Acceptance. This is the keystone of an employee-centered counseling approach. It allows for the following assumptions:

    1. Each individual is a person of worth and therefore is to be respected and valued as such.

    2. Each individual is capable of assuming responsiblilty for self. A person can, and will, under appropriate conditions, make the best or right decision or choices for herself/himself.

    3. Each individual has the right to self-direction, to choose or select his/her own personal values, career goals, and educational plans and to make personal decisions.

These assumptions are extremely important for neither the counselor nor anyone else can assume responsibility for or control of an employee's career decisions. For an example of applying this assumption, consider the case of a career counselor helping an employee discover interests and strengths through the administration of vocational interest surveys, aptitude batteries, and other vocational measures. By combining the resulting information with the employee's personal interests, past experiences, and scholastic achievement, the counselor may believe the employee should pursue a specific new training area. However, the decision must rest with the employee when weighing the variables to be considered in the career decision-making process. The counselor can help facilitate the weighing of the variables in this process, but the final determination belongs to the employee.

- Empathy. Empathy is viewing the world as the other person sees it or viewing the situation from the other person's internal frame of reference. By being empathic, the counselor has a better understanding of the employee's situation and a foundation for helping the employee to understand self and options more clearly.

- Understanding. Being empathic also requires the counselor to express understanding to the employee. This usually occurs by verbalizing the feelings of the employee after hearing the individual's concern. The skill of showing empathy can be attained only by paying attention to the employees and thinking about how they are feeling.

- Trust. This condition can be encouraged by creating an atmosphere that is nonthreatening, nonevaluative, and nonrejecting in nature.

- Respect. Counselors rarely verbalize their respect for a client, but they frequently communicate it through their actions toward and with the individual. Respect for the employee is demonstrated through (1) showing concern about what happens to the employee, (2) being generally available after employee work hours when employees may have a need for help, and (3) supporting the uniqueness of the employee--his/her needs, goals, and so forth.

Success in conveying the above characteristics revolves around the kinds of verbal and nonverbal responses employed in the interview. Certain response modes and verbal leads are particularly effective in each stage of the counseling process. Some encourage employees to talk and explore feelings. Other responses suggest an awareness that the counselor is concerned and listening. The counselor skilled in these communication techniques can adapt them to meet the contingencies of the situation. The selected use of lead and response techniques provides the means to ensure that verbal behavior during the interview is consistent with its overall purpose.

Frequently, the counselor desires to get the employee to take responsibility for the topic of discussion or to say more about a topic. Responses which typically facilitate these results include the following:

- Acceptance: This is a nondirective technique by which the counselor indicates interest in and acceptance of what the employee is saying without interrupting his/her train of thought or speech. This technique involves both the provision of nonverbal and verbal cues by which the helper tries to encourage the employee to continue. Verbal cues include a brief yes, uh-huh, I see, go on, and? then? Nonverbal cues include nodding, appropriate facial reactions, eye contact, and gestures which beckon.

- Clarification: With this type of response, counselors verbalize what they think the employee is trying to say in an effort to clarify, simplify, or provide focus to the employees' communication.

- Reflection: Reflection is a technique that serves several purposes. It encourages talk and also leads the employee to explore personal feelings and behavior. In using this response, the counselor attempts to mirror the feelings of the employee.

- Restatement: This is a technique which essentially involves mirroring the verbal expression of the employee by restating what has just been said. Done attentively and in an accepting way, this encourages the employee to continue in the same vein.

- Silence: In our culture, silence is an unexpected response during a verbal encounter. The silent "partner" puts pressure on the other to continue speaking. In counseling, it can be used appropriately to encourage talk if the counselor silently demonstrates attention, acceptance, and the expectation that the employee should continue.

Skill in knowing when and how to use various verbal and nonverbal communication techniques will contribute to the success of the first meeting between the counselor and employee. Subsequent interviews that focus on information gathering, career planning, and so forth, will be facilitated by the relationship established in that initial interview.

While the primary purpose of the intake interview is to explain the program's purpose and to establish rapport with the employee, the agenda for the interview should allow opportunity to gather some basic information about the employee that will help in employee assessment and program planning. For example, during the interview, the counselor should obtain employee demographic data; permission to access medical, education, and employment records; and statements of needs and expectations.

Demographic data about an employee can be obtained by asking the employee to complete a pre-printed form that requests such information. Permission to contact past supervisors/employers and school personnel for medical, education, and/or employment records can be obtained by asking the employee to sign a permission form stating that intent. Reasons why the employee is interested in the program--what needs he or she hopes to have satisfied--can be solicited through questions and answers presented during a description of the program purpose and services.

Since completing the paper work (intake forms and permission slips) will take approximately 15 to 30 minutes, it is usually more efficient to have the employee do these activities at the conclusion of the interview. However, time should be allocated for the counselor to explain the nature and purpose of the forms the employee will be asked to complete.

Finally, the intake interview should include a brief description of the program's set of services, goals and objectives, schedules, and conselor/employee responsibilities. During this orientation, employees should be encouraged to react to the information. The dialogue between counselor and employee should continue until the counselor is relatively certain that the employee grasps the essence of the program's purpose and services.

A successful intake interview takes pre-planning. Thus, before seeing the first employee, it is important to outline a strategy for conducting the interview, listing the characteristics important to establishing rapport and then the specific information to be gathered and the order in which it will be gathered. With an established agenda, the interview will be more likely to accomplish its intended purpose and to reveal the information that is necessary for future planning with the employee.

## The Intake Interview: What to Learn and How to Act

---

**OBJECTIVE:** List in sequence the topics to be covered in the interview and identify strategies for establishing a good counselor/employee relationship.

**REVIEW:** Discuss with colleagues and then identify specific strategies you will use to establish rapport with the employee and the topics you will cover in the intake interview.

**ACTIVITY:** Prepare the agenda for the intake interview.

**CHECKLIST:** You should have the following:

- A detailed agenda for the intake interview

---

REVIEW:

Review the guidelines for establishing counselor/employee rapport. Consider how the conditions can be incorporated into the interview. Discuss the topic with colleagues and identify the kinds of verbal and non-verbal communication that encourage rapport.

Select the practices that you think work best for you, based upon your personality and the way you interact with others. Then write down the guidelines you will follow and how you will put them into effect. For example, you might list (1) Be understanding: Confirm understanding of what the employee has said by restating his or her comment.

| Counseling Quality | Counseling Methods/Guidelines |
|---|---|
| 1. Empathy | |
| 2. Understanding | |
| 3. Trust | |
| 4. Respect | |
| 5. | |
| 6. | |

Next, discuss the topics you may want to present in approximately a 15-20 minute interview and determine the amount of time you need for each topic. Summarize your decision in the space below.

| Topics | Approach to be Used | Time Allocation |
|---|---|---|
| 1. Demographic Data | | |
| 2. Access to Records/ Data | | |

3. Needs and Expectations of Client

4. Interest in Program

When you have completed the REVIEW activities, discuss your conclusions with at least one other trainee. Solicit comments on your understanding and application of the concepts.

ACTIVITY:

List each topic you will cover in the intake interview. Record the amount of time you estimate needing for each topic. Then, list next to each topic three questions you might ask or statements you might make to encourage rapport between yourself and the employee.

Agenda for Intake Interview

| Counseling Topic | Est. Time | Lead Questions to be Used | Materials and Methods to Use |
|---|---|---|---|
| | | | |
| 1. | | | |
| 2. | | | |
| 3. | | | |
| 4. | | | |
| 5. | | | |
| 6. | | | |
| 7. | | | |
| 8. | | | |
| 9. | | | |
| 10. | | | |

CHECKLIST: Do you have the following:

| | Yes | No |
|---|---|---|
| o An Intake Interview Agenda | ___ | ___ |

---

| | |
|---|---|
| COMPETENCY #2 | **Choose or design an intake form to gather demographic and other relevant data from the organization's employees.** |

---

Initially, demographic data about the employee's personal, education, and employment history must be obtained and verified. The data can then be used to determine eligibility for services, assessment and exploration activities, program/service referral, and placement into education renewal programs. Standardized intake forms are commonly used to acquire client background data. They are also used to help clients begin to examine their own situations in a systematic manner.

An effective intake form should be well organized, thorough, and self-explanatory to reduce time and effort required to complete it. Generally, intake forms consist of several components: identifying data such as name and address; personal information, such as marital and family status; health and disability factors related to work and training; educational background; and employment history. Other sections are often added to acquire additional information.

Before selecting or designing an intake form, the counselor should decide what information is needed or desired for planning with the employee. Only relevant information should be acquired; information should never be acquired just on the off-chance that it may be useful later.

The language on the intake form should be easy to read and understand as some of the employees may lack basic skills in reading and writing. Other characteristics of the employees--such as the volunteer as well as employment history of recently hired displaced homemakers--should also be considered.

A comprehensive intake form may contain several sections that can be appended to a basic intake form for special situations or needs. For example, a monthly financial plan useful in identifying financial resources or barriers to further education or training could be added only as appropriate to a given employee. Appendix A contains samples of several intake forms and explanations of their appropriate use.

## The Intake Form: What Questions to Ask

| | |
|---|---|
| OBJECTIVE: | Identify the information required to assist the organization's employees in career planning and development. |
| REVIEW: | Analyze sample intake forms to determine the components of an intake form that are relevant to the employees of an organization. |
| ACTIVITY: | Select and/or design an intake form. |
| CHECKLIST: | You should have the following: |

o A comprehensive intake form

REVIEW:

Review the sample intake forms and consider the specific questions and components relevant to the career development and assistance of employees within an employment organization. Discuss the pros and cons of various sections with other trainees.

List the major components you want to include in your comprehensive intake form.

Major Components Comment

1. ______________________________

2. ______________________________

3. ______________________________

4. ______________________________

Other Possible Components

1. ______________________________

2. ______________________________

3. ______________________________

4. ______________________________

5. ______________________________

When you have completed the REVIEW activities, discuss your conclusions with at least one other trainee. Solicit comments on your understanding and application of the concepts.

ACTIVITY:

Design an intake form to use with the employees in the organization. Use portions of the sample form or of other forms referenced in the module in Appendix A. Write new sections and/or cut and paste sections of existing forms to develop the intake form you want to use.

CHECKLIST: Do you have the following:

| | Yes | No |
|---|---|---|
| o A comprehensive intake form | ___ | ___ |

---

COMPETENCY #3 Develop a system for acquiring and recording employee medical, education, and employment data.

---

During intake, counselors should receive permission for the release of relevant information from the employee's work supervisor and from school personnel who can supply educational records.

As information is collected through intake forms and through a variety of assessment methods--both informal and formal, it is important that the recordkeeping and documentation be thorough, accurate, and well organized so as to facilitate analysis and use.

The volume of information that could be generated from a number of employees demands that the counselor have good information organization skills. Following are several guidelines for acquiring and organizing client information:

- Collect only information that is needed for this specialized counseling process.

  The employee's records should contain a minimum amount of information; only data necessary for planning and goal setting and future counseling should be maintained in a file.

- Get employee permission to acquire pertinent records.

  Because of the confidentiality associated with an individual's records, it is necessary to obtain the employee's permission to contact past employers, schools, and health officials for information. To assure that your efforts are legal, obtain a signed permission slip from the employee before proceeding with such investigation.

- Keep test results on record.

  Additional to their use for client assessment, test score data can be used for the development of specific company benchmarks. Data in program files often may be used to create industry specific benchmark baselines for specific groups of jobs or employers. Data drawn together over a number of years and in sufficient quantity allow personnel managers to generate predictions of client success in training courses and as a result of fyuour counseling and guidance instruction.

- Ensure confidentiality of information.

  Important to the career development and assistance program is the need for strict confidentiality of employee information. Progress toward this goal starts by maintaining within the organization its high ethical standards of performance between the counselor and the employer/union representatives. There are many different actions that can be taken to ensure the security of employee records. Among them are the following:

  1. Use a code for employee identification on all forms containing sensitive information.
  2. Keep records under lock and key.
  3. Do not share personal information with prospective employers or with others in the employee's organization without employee approval.

  The privacy of the individual is very important in the counseling relationship; the professional standards of conduct regarding client information must be maintained.

Automation and computer technology have replaced or supplemented traditional career guidance record-keeping methods. Through computerized career guidance interactions, a complete data picture of an individual can be quickly stored and retrieved. Aggregate information--total client responses on a particular item or group characteristics of clients in a given category--can be programmed according to an organization's needs.

Several journals have devoted complete issues to the topic of the use of computers in counseling:

- Journal of Counseling and Development, November 1984--special issue on computers in counseling and development.
- The Counseling Psychologist, Volume II, No. 4, 1983--on computer-assisted counseling.

- Rehabilitation Counseling Bulletin, June 1985--special issue on implementing computer technology in the rehabilitation process.

Many counselors have their own personal computers or record storage retrieval systems. A single reformation of an existing system or process may be sufficient for the intended use.

## Employee Records: What to Keep and How to Store

| | |
|---|---|
| OBJECTIVE: | Outline a format to follow in establishing an employee file. |
| REVIEW: | Investigate various options for recording employee information. Discuss the benefits and feasibility of each option with colleagues. |
| ACTIVITY: | Establish an employee file system (paper and/or computerized) and include permission forms for acquiring information and strategies for maintaining confidentiality of those records. |
| CHECKLIST: | Do you have the following:<br>o An employee file system |

REVIEW:

Investigate methods of converting file information to floppy discs. Also investigate computer-based guidance systems, five of which are listed in the OVERVIEW. Prepare a brief summary report of one or two systems that would serve your counseling purpose and list the benefits of those systems. Also list benefits and uses of storage on floppy discs as they apply to the counseling process.

| Suggested Method/System | Comments (Pros and Cons) |
|---|---|
| 1. | |
| 2. | |
| 3. | |
| 4. | |
| 5. | |

When you have completed the REVIEW activities, discuss your conclusions with at least one other trainee. Solicit comments on your understanding and application of the concept.

ACTIVITY:

Determine the file system you will use, listing the key records you expect to keep on file. If you decide to use a combination of systems, including paper as well as computer storage, indicate which records you would store by each method and how you would ensure confidentiality. Also, prepare a release form for acquiring employee permission to obtain information from other sources. Appendix B provides a folder approach to record keeping. Appendix C suggests a sample release form.

CHECKLIST: Do you have the following:

| | Yes | No |
|---|---|---|
| o An employee file system | | |
| o An employee data release form | | |

---

COMPETENCY #4

**Prepare a presentation to orient the employee to the program's set of services, goals and objectives, schedules, and counselor/employee responsibilities.**

---

The intake process should also include an orientation to the entire human resource development or employee assistance program of the industry: the career planning and development program, the training and development program, and the counseling assistance and referral opportunities. The services, goals and objectives, schedules, and counselor/client responsibilities for each program should be described in full. By providing comprehensive and accurate program information, counselors can increase employee understanding of their options and clear up possible misconceptions. An outline of information to be presented during the orientation follows:

Provide an in-depth description of program services. Comprehensive information about each of the program services offered through the employee career development and assistance program should be presented to employees so they will know and understand their options. Following are some of the standard services that can be offered through the components of this guidance package.

1. Program Registration
2. Intake Interview
3. Assessment and Interpretation
4. Educational and Career Planning and Decision maing
5. Educational Development
6. Employability Skill Development
7. Personal Growth Activities
8. Variety of Wellness Activities, such as overcoming alcoholism, smoking, substance abuse
9. Study Skill Development
10. Further Education Registration and Financial Aid
11. Pre-retirement Planning

Present the goals and objectives of the human resource development program and program services. Explain the program services in relationship to needs employees may have at various stages of career planning. The following figure suggests goals related to the typical program components.

Relate scheduling information. Define the hours of operation and physical location of services being offered so employees will know how to obtain services with minimum discomfort and maximum ease and at what cost, if any. This information can only be determined when actually employed by the organization.

Describe counselor and client responsibilities. The more detailed the information on counselor and employee responsibilities, the easier it will be for all employees to make use of various components of the employee career development and assistance program.

During the program orientation and/or interview, employees also should be informed that the information requested during intake and subsequent assessment meetings will be used in the planning process and that such information may be referred to at various points throughout the counseling relationship to provide direction. Any formal assessment will become less threatening as clients recognize that each assessment will add just one more piece of information to be considered in the counseling process and are convinced that such information will be kept confidential.

## The Orientation: What to tell about the program

| | |
|---|---|
| OBJECTIVE: | Outline an orientation presentation about the employee career development and assistance program and services. |
| REVIEW: | Review the services recommended in this model and determine how you would introduce and explain each. Write a brief description of your plan. |
| ACTIVITY: | Prepare a presentation orienting employees to the program and services. |
| CHECKLIST: | You should have the following:<br>o A detailed program orientation |

REVIEW:

After reviewing the services recommended in this module, brainstorm additional services that might be available in your community and through the employer organization that you will be serving. Outline the various services you will offer and the linkages between one and another. Discuss your outline with other trainees or colleagues.

In preparation, write a brief description of your plan for offering a program orientation.

General Topical Area          Items to Cover

1. ______________________________

2. ______________________________

3. ______________________________

4. ______________________________

5. ______________________________

When you have finished your REVIEW of this activity, discuss your conclusions with at least one other trainee. Solicit comments on your understanding and application of the concepts.

ACTIVITY:

Now, outline a more detailed presentation to orient employees to the program and services. Give the presentation to other trainees or colleagues. Ask the listeners to comment on the strengths and weaknesses of your presentation. Adapt your presentation to incorporate the recommendations of others. Use Exhibit #1 as an example of issues to cover. (Note: To be specific, you'll need in advance the program description of a company for which you might be scheduled to work.)

CHECKLIST: Do you have the following:

| | Yes | No |
|---|---|---|
| o A detailed program orientation | | |

## Exhibit I

## Sample Orientation Agenda
(for either individual client or group use)

### Client Needs and Program Services Matrix

| Possible Client Interest & Need | Employee Assistance Program Activity Evaluation | Services from Community/Public Agencies |
|---|---|---|
| 1. | | |
| 2. | | |
| 3. | | |
| 4. | | |
| 5. | | |
| 6. | | |
| 7. | | |

# APPENDIX A

## Example 1: Sample Intake Form

### SAMPLE INTAKE FORM

Interviewer ____________________

Date ____________________

#### Intake Comments

Name ________________________________________

Address ____________ City ____________ *Zip* ____________

Phone ____________

Date of birth: Month ____________ Day ____________ Year ____________

Marital Status Single ____________ Divorced ____________

Separated ____________ Widowed ____________

Other ____________ How long? ____________

Number of children ____________ Ages ____________

Ethnic background ________________________________________

#### Education History

1. What was your highest grade completed in school?

   High school graduate? ____________ Year ____________

   College graduate? ____________ Year ____________

   Semester completed, if you did not graduate ____________

   Technical school graduate? ____________ Year ____________

   Other (specify) ____________________

2. What was your major course of study? ____________________

   Degree (specify field) ____________________

3. Do you hold any certificates or licenses?

   Yes ________ No ________

   Certificate (specify) ____________________

   License (specify) ____________________

SOURCE: Vetter, Hull, et al. (1986, pp 42-58).

Example 1—*Continued*

### Work History

1. Have you ever been employed?

Yes _______ No _______ Full-time _______ Part-time _______

a. If yes, please list:

| **Date** | **Type of Company** | **Duties/Responsibilities** |
|---|---|---|

b. If no, what kinds of responsibility did you have as a homemaker?

_____ Parenting
_____ Nursing
_____ Housekeeping
_____ Purchasing major household items
_____ Others (specify)
_____ Sewing
_____ Gardening
_____ Banking/bookkeeping
_____ Frequent entertaining

### Volunteer History

1. Have you ever done volunteer work? Yes _______ No _______

Church __________________ School ________________ Hospital __________________

Community organizations _________________

City, county, or state agencies _____________________ Other_____________________

If yes, please list:

| **Date** | **Affiliation** | **Duties/Responsibilities** | **How Long?** |
|---|---|---|---|

SOURCE Originally developed for Displaced Homemakers Program housed at Mills College, now at Women's Care Center (n.d.)

Example 1—*Continued*

### Health Screening

1. How would you describe the status of your general physical health?

Excellent _______ Good _______ Fair _______ Poor _______

2. Are you bothered by any chronic conditions?

Yes _______ No _______

If yes, explain ____________________________________________

____________________________________________

3. When was the last time you had a complete physical examination?

Month _______________ Year _______________

4. Do you have a regular source of health care at this time?

Yes _______ No _______

If yes, what source? ____________________________________________

### Use of Resources

1. Have you gone to a JTPA office for certification?

Yes _______ No _______

2. Have you gone to a public employment office for service?

Yes _______ No _______

If yes, explain ____________________________________________

____________________________________________

3. Have you gone to a private employment agency?

Yes _______ No _______

If yes, explain ____________________________________________

____________________________________________

4. Other (specify) ____________________________________________

____________________________________________

____________________________________________

SOURCE Originally developed for Displaced Homemakers Program housed at Mills College, now at Women's Care Center (n.d.)

Example 1—*Continued*

5. Have you investigated whether you are eligible for any of the following types of assistance?

Alimony ____________

Veterans Administration benefits ____________

Unemployment insurance ____________

Welfare—Aid to Families with Dependent Children ____________

Food stamps ____________

Social Security ____________

Pension/retirement benefits ____________

Disability payments ____________

General Assistance ____________

Medical ____________

Other (specify) ____________

**Assessment of Financial Resources**

What financial resources do you have available to you?

Income ____________

Savings ____________

Social Security ____________

Insurance benefits ____________

Disability benefits ____________

Veterans Administration benefits ____________

Other (explain) ____________

____________

2. How did you meet your living expenses and financial obligations during the past three months?

____________

____________

3. How do you plan to meet your living expenses and financial obligations during the next three to six months?

____________

____________

SOURCE Originally developed for Displaced Homemakers Program housed at Mills College, now at Women's Care Center (n.d.)

Example 1—*Continued*

## Personal Profile

1. How did you learn about this program?

Newspaper ________ Radio ________
Magazine ________ Friend ________
Television ________ Other (specify) ________

2. How was your initial contact made with this program?

Telephone ____ Drop-in ____ Other (specify) ________

3. How do you spend your spare time? Please list hobbies, activities, etc.

________________________________________

________________________________________

4. What are your reasons for wanting to become involved in this program? Please check all that apply:

____ a. Explore new directions for my life
____ b. Meet people with similar problems
____ c. Receive intellectual stimulation
____ d. Develop self-confidence
____ e. Help in defining the kind of job I want
____ f. Assistance in finding a job
____ g. Upgrade present skills
____ h. Develop new skills
____ i. Recent work experience
____ j. Financial assistance
____ k. Other (specify) ________________________________
________________________________

5. What problems do you face? Check all that apply:

____ a. Lack of transportation to this program
____ b. Other home responsibilities (care of aged relative, children, etc.)
____ c. Lack of personal direction
____ d. Language barriers

SOURCE Originally developed for Displaced Homemakers Program housed at Mills College, now at Women's Care Center (n d )

Example 1—*Continued*

____ e. Educational limitations

____ f. Attitudes of family toward building a new life

____ g. Lack of funds for study or other expenses

____ h. Other (specify) ________________________________

________________________________________________

## Work Values Profile

1. Indicate which factors are important influences toward your satisfaction with a job.

Use a scale of 1 - 3: 1 - very important
2 - a key consideration
3 - not important

____ a. Earning a large salary

____ b. Satisfying my family/friends with my career choice

____ c. Personal satisfaction with my work

____ d. Prestige, "high status" job

____ e. Intellectual stimulation

____ f. Creative flexibility

____ g. Job security

____ h. Flexible schedule

____ i. Helping others

____ j. High degree of autonomy

____ k. Exciting environment

____ l. Challenging work, but without pressure

____ m. Working by myself

____ n. Working as part of a team

____ o. Supervising others

____ p. Being my own boss

2. Which three of the above items are most important to you in terms of what you want out of your work?

________________________________________________

________________________________________________

________________________________________________

SOURCE: Originally developed for Displaced Homemakers Program housed at Mills College, now at Women's Care Center (n.d.)

Example 1—*Continued*

### Action Plan

1. What are your present goals? Please be specific and identify at least two:

   a. ____________________

   b. ____________________

2. What do you think you need to reach your goals? Check all that apply:

   a. Emotional support:

      ____ Individual counseling

      ____ Assertiveness training

      ____ Group involvement

   b. ____ Short-term training for skill development

   c. ____ Long-term training for skill development

   d. ____ More education

   e. Recent work experience through:

      ____ Trainee placement

      ____ Volunteer placement

   f. ____ Testing

   g. Special assistance:

      ____ Widowhood counseling

      ____ Marriage-dissolution counseling

      ____ Money management

      ____ Financial assistance

      ____ Upgrading skills

      ____ Other (specify) ____________________

      ____________________

   h. Job readiness:

      ____ Resume writing

      ____ Interviewing techniques

SOURCE Originally developed for Displaced Homemakers Program housed at Mills College, now at Women's Care Center (n d )

Example 1—*Continued*

i. Crisis intervention:

____ Emergency food

____ Shelter

____ Legal assistance

j. Self-employment exploration:

____ Information

____ Financing

k. Other (specify)______________________________

________________________________________

**Disposition**

______ Job ready ______ Not job ready

Referral made to

1. This program:
   - a. Workshop (specify) ____________________
   - b. Volunteer coordinator ____________________
   - c. Trainee coordinator ____________________
   - d. Other staff (specify) ____________________
   - e. Displaced homemaker classes ____________________
   - f. Other (specify)____________________
2. Outside resource/agency:
   - a. JTPA____________________
   - b. Employment agency ____________________
   - c. Food stamp office____________________
   - d. Medical office____________________
   - e. Other (specify)____________________

________________________________________

SOURCE: Originally developed for Displaced Homemakers Program housed at Mills College, now at Women's Care Center (n.d.).

Example 1—*Continued*

3. Job referral:

Potential employer ______________________________

Job title ______________________________

Address ______________________________

Phone ______________________________

Salary ______________________________

4. Job follow-up:

Contact dates ______________________________

Contact made by: in the chart below, list the contact date and the name of the contact person:

| | **Date** | **Person** |
|---|---|---|
| Telephone | | |
| In person | | |
| Letter | | |

Comments: ______________________________

______________________________

______________________________

SOURCE: Originally developed for Displaced Homemakers Program housed at Mills College, now at Women's Care Center (n.d.)

## Example 2: Intake Form Emphasizing Work History

### INTAKE FORM

Date: ____/____/____

Name: ________________________________________
Last First Middle

Address: ________________________________________
Street City State Zip

Phone: ____________________ ____________________
Home Other

Social Security No: _______ ____ _______

Age: _______ Birthdate: ________________________________________

////////////////////////////////////////////////////////////////////////////////////////////////////

Sex: M F U.S. citizen: Yes No

National origin: _____ White _____ American Indian
_____ Hispanic _____ Black _____ Other

Bilingual: _____ Yes _____ No Marital status: ____________________

Language: ____________________

Number of dependents: _______ Ages: ____________________

////////////////////////////////////////////////////////////////////////////////////////////////////

Does language pose a barrier to employment/training? _____ Yes _____ No

Will child care pose a problem? _____ Yes _____ No

Explain: ________________________________________

________________________________________

________________________________________

SOURCE: Adapted from various intake forms used by government and social service agencies

Example 2—*Continued*

Physical health: ____ Excellent ____ Fair ____ Poor

Do you have disabilities? Yes No

If yes, explain: ______________________________________________

______________________________________________

Are there limitations imposed by your disability? Yes No

If yes, explain: ______________________________________________

Are you taking medication? Yes No

Were you ever referred to the State Vocational Rehabilitation Program? Yes No

Receiving AFDC ____ Welfare ____ SSI ____

Ex-offender ____ Other assistance ______________________

//////////////////////////////////////////////////////////////////////////////////////////

Military service: Yes No

Branch: ______________________ Rank: ______________________

Specific duties or training received: ______________________

______________________________________________

Date entered: ______________________ Date separated: ______________________

Type of discharge: ______________________ VA-rated disability: Yes No

Are you eligible for VA benefits? Yes No

//////////////////////////////////////////////////////////////////////////////////////////

Do you have a valid driver's license: Yes No

Do you have a chauffeur's license: Yes No

Transportation: Own car ____________ Bus ____________

Family car ____________ Other ______________________

Friend ____________ ______________________

SOURCE Adapted from various intake forms used by government and social service agencies

Example 2—*Continued*

Do you have tools for a specific trade or occupation? ____________________

If yes, what type of trade? ____________________

Do you have any special job skills? ____________________

What machines have you operated? ____________________

////////////////////////////////////////////////////////////////////////////////////////////////////

Last high school attended: ____________________ City: ____________________

Highest grade completed: 7 8 9 10 11 12

Year of graduation: ____________

Special courses taken in high school:

| Shop/Vocational | Business/Commercial | Math/Science |
|---|---|---|
| | | |
| | | |
| | | |
| | | |

Approximately how many days per year were you absent? ____________________

Is a copy of your high school transcript or GED scores attached? Yes No

If you do not have a high school diploma, do you have a GED? Yes No

If you have a GED, what is the date of completion? ____________________

////////////////////////////////////////////////////////////////////////////////////////////////////

Other training: Trade School/Business School/Apprenticeship

Name: ____________________ City: ____________________

Type of training: ____________________

Dates attended: From ____________________ To ____________________

SOURCE Adapted from various intake forms used by government and social service agencies

Example 2—*Continued*

Date of graduation: ____________

License or certificate: ________________________________

College:

Name: ________________________ City: ________________________

Major/minor: ________________________ / ________________________

Credit hours completed: ________________ Degree: ________________

Dates attended: From ________________ To ________________

________________________________________________________

________________________________________________________

////////////////////////////////////////////////////////////////////////////////////////////////////

Previous employers:

Employer: ____________________ Pay rate: ____________________

City and state: ________________________________________

Dates Employed: From ________________ To ________________

Job title: ________________________________________

Duties/responsibilities: ________________________________

________________________________________________________

________________________________________________________

Did you receive specialized training? Yes No

If yes, explain: ________________________________________

________________________________________________________

Did you miss any days on the job? Yes No

Explain: ________________________________________________

SOURCE Adapted from various intake forms used by government and social service agencies

Example 2—*Continued*

Why did you leave? ____________________

Did you like that type of work? Why or why not? ____________________

Employer: ____________________ Pay rate: ____________________

City and state: ____________________

Dates employed: From ____________________ To ____________________

Job title: ____________________

Duties/responsibilities: ____________________

Did you receive specialized training? Yes No

If yes, explain: ____________________

Did you miss any days on the job? Yes No

Explain: ____________________

Why did you leave? ____________________

Did you like that type of work? Why or why not? ____________________

////////////////////////////////////////////////////////////////////////////////////////////////////////

Employer: ____________________ Pay rate: ____________________

City and state: ____________________

Dates employed: From ____________________ To ____________________

Job title: ____________________

SOURCE Adapted from various intake forms used by government and social service agencies

Example 2—*Continued*

Duties/responsibilities: ______________________________

________________________________________

________________________________________

Did you receive specialized training? Yes No

If yes, explain: __________________________________

________________________________________

Did you miss any days on the job? Yes No

Explain: ____________________________________

Why did you leave? _______________________________

Did you like that type of work? Why or why not? ____________________

________________________________________

////////////////////////////////////////////////////////////////////////////////////////////////////

Do you have any volunteer experience? Yes No

If yes, explain: __________________________________

________________________________________

________________________________________

SOURCE Adapted from various intake forms used by government and social service agencies

**Example 3: Educational Record**

## RECORD OF EDUCATION

Name____________________________

1. List all education or training you have received whether you finished it or not. Be as specific as you can regarding course of study and other activities (such as clubs, extracurricular activities, or independent learning projects).

| Type of School | Name and Address of School | Course of Study | Other Activities | Dates Attended | Degree |
|---|---|---|---|---|---|
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |

2. List and describe any education or training you have received on-the-job from an employer.

________________________________________

________________________________________

3. List and describe any training you received through the military.

________________________________________

________________________________________

4. List and describe any educational projects or learning you have done on your own (include reading, self-study, correspondence courses, etc.).

________________________________________

________________________________________

BEST COPY AVAILABLE

### Example 4: Monthly Financial Plan

## MONTHLY FINANCIAL PLAN

NAME: ____________________

WHAT I SPEND EACH MONTH:

A. Basic Expenses

| | |
|---|---|
| Food | $ ______ |
| Rent or Mortgage | ______ |
| Clothing | ______ |
| Laundry/Drycleaning | ______ |
| Cooking/Heating Gas | ______ |
| Fuel Oil | ______ |
| Electricity | ______ |
| Water | ______ |
| Telephone | ______ |
| Insurance Payments | ______ |
| Doctor and Dentist | ______ |
| Medicine | ______ |
| Taxes | ______ |
| Church | ______ |
| Bus and Cab Fares | ______ |
| Daily Expenses (Lunch, etc.) | ______ |
| Car Repairs/Gasoline | ______ |
| Amusement | ______ |
| Personal & Grooming | ______ |
| Home Repairs/Upkeep | ______ |
| Savings | ______ |
| Other | ______ |

TOTAL BASIC EXPENSES: $ ______

B. Other Bills I Owe

| | |
|---|---|
| Loan Company or Bank | ______ |
| Department Stores | ______ |
| Car Payments | ______ |
| Hospital | ______ |
| Other | ______ |

TOTAL OTHER BILLS:

C. TOTAL OF BASIC EXPENSES (Section "A") AND OTHER BILLS I OWE (Section "B"): $ ______

D. WHAT I SPEND EACH MONTH (total of Sections A, B, C) $ ______

E. MY MONTHLY INCOME: (Take Home Pay)

| | |
|---|---|
| Employment | $ ______ |
| Social Security | ______ |
| Pension | ______ |
| Public Assistance | ______ |
| Alimony | ______ |
| Rentals | ______ |
| Insurance Dividends | ______ |
| Other | ______ |

TOTAL MONTHLY INCOME: $ ______

F. WHAT I SPEND EACH MONTH: (from Section D) $ ______

(Subtract What I Spend Each Month from Total Monthly Income)

THIS IS WHAT I HAVE LEFT FOR ADDITIONAL CASH OR CREDIT BUYING: $ ______

APPENDIX B

# career portfolio

STUDENT NAME ____________________

ADDRESS ____________________

____________________

____________________

TELEPHONE NUMBER ____________________

SOCIAL SECURITY NUMBER ____________________

BIRTH DATE ____________________

GRADUATION DATE ____________________

---

## CONTENTS

**Include the following kinds of documents in this folder:**

- ☐ **RESUME/CAREER PASSPORT**
- ☐ **SAMPLE COMPLETED JOB APPLICATION**
- ☐ **TRANSCRIPT OF GRADES**
- ☐ **COMPETENCY RECORDS**
- ☐ **STANDARD TESTS (SCORES IF AVAILABLE)**
- ☐ **CREDENTIALS FOR EMPLOYMENT**
- ☐ **LETTERS OF RECOMMENDATION**

OCCUPATIONAL PREFERENCES: ______________________________

Interests: ______________________________

Church and Community Activities: ______________________________

**STANDARD TESTS (Scores if available)**

| Test | Score |
|---|---|
| | |
| | |
| | |
| | |
| | |
| | |

Vocational Skills

| Type | Work Exp. | Training Program | Types of Tasks |
|---|---|---|---|
| *Example: Typewriting (speed)* | X | X | Word Processing (IBM) |
| Typewriting (speed) | | | |
| Shorthand (speed) | | | |
| Accounting/Bookkeeping | | | |
| Electronics | | | |
| Metals | | | |
| Foods | | | |
| Clothing | | | |
| Welding | | | |
| Auto Mechanics | | | |
| Woodworking | | | |
| Industrial Machines | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |

The information in this folder has been compiled jointly by the student and the faculty.

Work Experience

Company Name: ______________________________

Duties: ______________________________

Company Name: ______________________________

Duties: ______________________________

Company Name: ______________________________

Duties: ______________________________

Additional names and information appear in the resume/Career Passport.

Instructions: Complete the form printed on the inside of this folder. As you use this Career Portfolio to store various documents, update the information you recorded. All information in and on this folder should be current.

## COURSE RECORD

| | | | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|
| | | | | | | | | | | | |
| | | | | | | | | | | | |
| | | | | | | | | | | | |
| | | | | | | | | | | | |

## EXTRACURRICULAR ACTIVITIES

| Activity | Responsibility | Office Held (if any) |
|---|---|---|
| | | |
| | | |
| | | |
| | | |

## HONORS AND AWARDS

| |
|---|
| |
| |
| |
| |

## APPENDIX C

### General Release Form

I do hereby grant to _________________________ (career guidance counselor) full and complete rights to obtain job-relevant information from employers and from school and health officials. The information obtained must be kept confidential.

Name: ____________________________________________

Date: ____________________________________________

Signature: ____________________________________________

Witness: ____________________________________________

ABOUT THIS MODULE #2

## Employee Assessment

---

| | Goal |
|---|---|
| ESTABLISH AN ASSESSMENT PLAN | After completing this module, career guidance personnel will be able to conduct informal and formal assessments and interpret results to identify employee needs, interests, and aptitudes. |

---

Competency #1: Design an assessment plan that details the scope of the assessment effort and the employee characteristics and needs to be assessed through the program.

Competency #2: Select the most appropriate methods of informal assessment to use in an employer/organizational setting and describe the benefits of each.

Competency #3: Select, modify, or develop appropriate formal assessment instruments, including any instruction sheets that will be required to complete the instruments correctly.

Competency #4: Specify how information and data collected from each selected method of assessment will be analyzed and communicated to the employee.

---

Assessment is the process of analyzing and evaluating an individual's strengths and weaknesses. It can involve any topics that enhance or increase self-knowledge. It generally includes the examination of the individual's skills and abilities, aptitudes, interests, attitudes, values, and personality. The purpose of assessment is to provide the counselor and the individual with an accurate and thorough information base from which the employer can develop realistic career plans and goals. This module will provide the information and learning activities that will help counselors develop the critical competencies necessary to conduct employee assessments that will facilitate such indepth career exploration.

The standard format used in this and other modules for this program is as follows:

- About This Module: This section presents (1) the goal--a statement of what one should be able to accomplish by completing the module, and (2) an outline of the competencies thought to be most critical to achieving the goal.

- Overview: The overview offers an introduction to the topic and describes the purpose and content of the competency to be addressed.

- Learning Experiences: Each learning experience is designed to help users develop a specific competency. Within this section of the module are the following components:

  Objective: This statement describes the skills the trainee must be able to demonstrate at the conclusion of the learning experience.

  Review: This section includes individual exercises the trainees complete to demonstrate understanding of the competency. It also provides opportunities for immediate feedback regarding their understanding and progress.

  Activity: The activity is designed to engage the trainee in performing the tasks for which the competency is required. The suggested activities involve a blend of development, presentation, and "hands-on" participant activities, such as games and role playing.

  Checklist: The checklist is an itemized list of materials the trainee should have developed, acquired, and assembled through the learning experience.

- Evaluation: This section of each module contains information and instruments that can be used to measure what workshop particpants need prior to training and what they have accomplished as a result of training. Included in this section are a Pre- and Post-Participant Assessment Questionnaire and a Trainer's Assessment Questionnaire.

- References. All major sources that were used to develop the module are listed in this section. Also, major materials resources that relate to the competencies presented in the module are described and characterized.

## OVERVIEW

---

| | |
|---|---|
| COMPETENCY #1 | Design an assessment plan that details the scope of the assessment efforts and the employee characteristics and needs to be assessed through the program. |

---

Ideally, information gathering efforts should reveal as much as possible about the employee--his/her needs, interests, potential for retraining, and career goals. Following are some dimensions to consider in specifying the scope of employee assessment efforts:

1. Content and Direction of Focus.

   This dimension refers to the purpose of the assessment. Which needs should be identified within the context of the work effort? physical? emotional? social? educational? occupational? all of the above? The following kinds of questions could be asked of each employee:

   Example:

   Indicate skills you currently have or need help with:

| | Strengths | Need Help |
|---|---|---|
| Communication Skills | | |
| Coping Skills | | |
| Listening Skills | | |
| Job-keeping Skills | | |
| Human Relations Skills | | |
| Decision-Making Skills | | |
| Study Skills | | |
| Promotion Application Skills | | |
| Training Registration Skills | | |

### 2. Breadth of Focus

This refers to the comprehensiveness of the assessment--how many areas will be covered. The choice depends upon the purpose of the assessment and the comprehensiveness of the employee assistance program.

Example:
Indicate previous skill training activities you've participated in or would like to participate in if they were available.

| Activities | Have Participated | Would Participate |
|---|---|---|
| Career Planning | | |
| Career Development Class | | |
| Personal Counseling | | |
| College Placement (part time) | | |
| Job Survival Skills Seminar | | |
| Occupational Information Resources | | |
| Computerized Job Search | | |
| Financial Aid Assistance | | |
| Study Skills Training | | |
| Support Groups | | |
| Test Explanation | | |
| Support Services Introduction | | |

### 3. Depth of Coverage

This refers to the overall length and depth of the assessment . . . how long it will take respondents to complete a questionnaire, to be interviewed, to take tests, and so forth; and how deeply the analysis will probe into the areas of focus.

### 4. Degree of Structure

This refers to the nature of responses called for by the respondent. Will respondents be asked to check, circle, or rank their responses or will they be asked to structure their own responses on an open-ended questionnaire or in an interview? The more structured responses make the task of recording and analyzing data easier. Open-ended questions allow more individual expression and may also produce insights and suggested selections, which is excellent for individual counseling with employees.

### 5. Personalization

Assessment techniques range all the way from individual interviews, in which the respondent talks to the interviewer, to the group inventory in which many individuals indicate their feelings on paper. The degree of personal attention is a dimension upon which assessment approaches vary.

### 6. Sampling Considerations (onlyh if doing total corporate planning)

This dimension refers to who and how many individuals/groups will be assessed. Should information be obtained from employees only or should it come from supervisors, managers, and other employers as well? When one is working long term with an employer, it would be most time efficient if group assessments could be scheduled prior to individual counseling sessions.

### 7. Quality

Three factors are particularly important in determining the quality of any assessment instrument and procedure used in individual employee assessment:

a. Validity: Does the instrument actually measure what it is designed to measure? This implies that the counselor and agency needs to know minimally what is needed for educational and career planning purposes.

b. Reliability: Does the instrument produce consistent results over repeated usage. This is especially true if the counselor has an ongoing relationship with the company.

c. Readibility: Are the language and examples used appropriate for the employees being served. The best way of testing this factor is to perform some pilot tests of the instruments and instructions to assure their usability.

### 8. Ease of administration

This dimension includes several factors: (a) ease in processing data, (b) time of administration, (c) amount and nature of training necessary for administration, (d) scheduling flexibility for administration, and (e) appropriateness of the instrument for the level of respondents. In an employment setting, special consideration should be given to self-administered, mediative individual or group systems or group process methods of assessment.

Once the scope of the assessment has been determined, the various tasks of assessment should be considered. Zuker (1981) provides specific suggestions for tasks:

- Identify and evaluate previous work experience and life experiences
- Identify desired work tasks and leisure experiences.
- Assess family relationships.
- Identify career satisfaction variables and specific interest patterns.
- Identify and evaluate occupational interests, inside and outside the current company.
- Relate interests to past experiences and compare interests with identified skills
- Relate interests to potential and new occupational requirements and avocational needs.
- Identify and evaluate skills developed through previous work experiences, leisure learning experiences, and formal learning experiences.
- Identify and evaluate previously developed functional, technical, and adaptive skills

Analysis data from assessment can then be obtained through either informal or formal methods. Each method offers the capability of learning indepth information about the employee. Informal assessment refers to such methods as observations, interviews, consultations, and examinations of records. Formal assessment refers to the use of instruments, e.g., standardized tests, as a method of gathering data about an individual.

In designing an assessment plan, consideration also should be given to flexibility of implementation. Counselors should have the capability of using a variety of assessment methods so they can select those that are most appropriate to a given individual's needs, and time and resources provided. Then, based on the analysis of those needs, the counselor can introduce a planned continuum of activities and experiences, and link these to the career development process for either the individual employee or group of employees that labor or management would like to have involved.

Decisions about the scope, direction, and methods of assessment should be conveyed to employees at an orientation to the assessment phase of the program. Employees should be informed that the information requested during various assessment activities will form the basis for future decision-making and planning activities. As employees understand that assessments merely provide bits of information to be used in the career counseling process, the introduction of formal assessment instruments or methods will become less threatening. A brief explanation of data collection instruments, recording procedures, and the career planning and decision-making process should conclude the orientation.

## The Assessment Plan: Where to focus assessment efforts

---

OBJECTIVE: Identify the specific dimensions of the assessment effort and the employee characteristics and needs to be assessed.

REVIEW: Discuss the scope of the assessment plan you would design for employees of an organization and identify the tasks you consider to be most relevant to the program.

ACTIVITY: Outline the scope of the assessment plan, listing the employee characteristics and needs to be assessed.

CHECKLIST: You should have the following:

- o An assessment plan

REVIEW:

Review the dimensions to be considered in determining the scope of employee assessment efforts. Discuss with other trainees or colleagues the parameters of such efforts and the focus most suitable for an employee career development and assistance program.

Based on your introspection and on input from others in the group, state the purpose of the assessment efforts and list the type of information you want to obtain. Also, describe reasons why you want to gather certain information and how you will use the information you gather.

| Purpose of Assessment | Data Needs that Drive Assessment Methods |
|---|---|
| 1. | |
| 2. | |
| 3. | |
| 4. | |
| 5. | |

When you have completed the REVIEW activities, discuss your conclusions with at least one other trainee. Solicit comments on your understanding and application of the concepts.

ACTIVITY:

Using the nine dimensions listed in the OVERVIEW, specify the conditions for a needs assessment of an individual employee career development, educational planning and assistance program. List the decisions that need to be made and your recommendations for completing the tasks on the form provided on the following page.

Show your plan to other trainees and colleagues. Revise your plan based on their input.

CHECKLIST: Do you have the following:

| | Yes | No |
|---|---|---|
| o An assessment plan | | |

## ACTIVITY WORKSHEET
## INDIVIDUAL CLIENT ASSESSMENT PLAN

(CLIENT NAME) (DATE)

| Dimension | *Condition Issue | Decision to be Made | Recommendation for Next Steps |
|---|---|---|---|
| 1. Assessment Focus | | | |
| 2. Breadth of Focus | | | |
| 3. Depth of Doverage | | | |
| 4. Structure | | | |
| 5. Personalization | | | |
| 6. Sampling Considerations | | | |
| 7. Quality Issues | | | |
| 8. Administration Issues | | | |
| | *o Time<br>o Client interest<br>o Client Availability and Need<br>o Education Institution Requirements<br>o EAP Data Needs and Requirements | *What special considerations need to be considered in order to complete full assessment process? | *The what, when, where, and how specifics |

## OVERVIEW

---

| | |
|---|---|
| COMPETENCY #2 | **Select the most appropriate methods of informal assessment to use in an organizational setting and describe the benefits of each.** |

---

Informal assessment involves the analysis of information gathered from observations, reports from instructors and supervisors; school, work, and health records; and personal interviews and conferences. These assessment methods provide the counselor with information about the employee's current interests, attitudes, and feelings--all of which have bearing on continued employability and promotability--and which can be used with data collected through formal assessment instruments to aid in educational and job exploration and planning.

### Observations

Employees, particularly those who need skill updating to be involved in job and career progression within an organization, could send clear messages about their interest, satisfaction, or feelings of training needs by the way they plan for growth within an organization. Some questions for which to seek answers through observations are: What is the employee's demonstrated attitude toward work, the company, supervisors, and coworkers? Does the employee use his or her work time effectively? Is the employee able to perform work tasks independently and correctly? While observations are an effective way to learn such information, the following cautions should be heeded: (1) Make sure the employee does not feel singled out for observation more frequently than anyone else. (2) Do not let personal biases affect judgment. (3) Compare personal observations with other sources of information.

Education, Medical, and Work Experience Records.

During assessment, information about past conditions and experiences should be examined to evaluate successes and failures and to identify possible patterns. Information from education, medical, and work experience records can provide valuable input in the overall analysis of employee career needs and educational plans. The following types of records can provide valuable insight into the employee's skills and skill needs.

- Education records which provide information on academic and vocational courses and on attendance and punctuality as well as academic achievement. These records offer clues to the employee's future work and education objectives and potential, however, they may not pinpoint the individual's specific strengths or needs which could be enhanced by acquiring new training.
- Medical and health records which document the extent of impairments, physical capacities, and motor skills, as well as the means by which an individual compensates (for example, by using braille, wheelchair, and so forth). Such records, however, may not always have complete information and may simply describe the presence of a mental or physical impairment. Because some impairments go undetected, they may not be recorded, but the counselor needs to keep record of them.
- Work experience records which yield useful information about past job performance, work attitudes, and habits. This information likely will be in the form of employer references or performance evaluations.

## Developing Customized Instruments

Sometimes it is more appropriate to develop a new instrument for assessment purposes. For example, a questionnaire to use in a personal or telephone interview may reveal more specific information if developed by the counselor to uniquely serve the employees of a given organization. In developing an assessment instrument, there are several item formats that can be followed. They are (1) formats that require a free or open-ended response, (2) formats that require a yes/no response, (3|) formats that provide multiple-choice options, and (4) formats that require ranking on a scale. Any or all of the formats can be used in a needs assessment instrument.

Six characteristics of effective assessment items follow. These criteria can serve as reference in developing or selecting instrumentation:

1. Items should seek information which cannot be readily obtained from other sources.
2. Items should be clearly stated, unbiased, and create no embarrassment or annoyance to persons who respond.
3. Items should use language which is in common usage by the general population.
4. Items should reflect a neutral position as to the "correct" response.
5. Items should deal with one concern per item; one subject, one action, and one object of the action.
6. Response choices should be clear and understandable with commonly agreed upon meanings.

Counselors who develop their own assessment instruments should have each item reviewed by a variety of individuals for content, readability, and style. Concise and complete instructions should accompany and introduce the instrument. Also included should be a statement of the purpose of the assessment instrument and a description of how the information to be obtained will be used. In this way, respondents can feel that they are playing an important role in their onw development process.

Personal and Telephone Interviews.

In gathering information about employee needs and interests, maximum gain can be achieved by soliciting input from all who know the employee, including supervisors, fellow employees, and family members. While this level of data might not be needed for this Employability Assistance Program, the most appropriate methods of gathering information about employees are the personal interview and the telephone interview.

Personal interviews, allowing for face-to-face interactions between the counselor and employee, can provide in-depth information not easily obtained through other methods. Since personal interviews usually do not follow a predetermined set of questions, different information often is gathered with each interview, thus allowing for inconsistency in the type of information collected from one employee to another. Because employee responses to questions posed in the interview cannot always be recorded while the interview is in progress, care should be taken to note complete responses immediately after the interview is over.

The telephone interview, which also involves a personal touch, has the key advantage of being time efficient. People can respond from their offices or homes, without having to travel to designated meeting spots. As with the personal interview, interviewee responses not recorded during the interview, must be recorded immediately after to assure they are not forgotten. Another consideration of the telephone interview is that it limits the amount and type of questions that can be asked. It also prevents respondents from thinking through the questions so they can offer thorough replies.

A summary of the advantages and disadvantages of each interview method follows:

| Assessment Methods | Advantages | Disadvantages |
|---|---|---|
| Personal Interview | o Human touch<br>o In-depth responses | o Small number of interviewees<br>o Difficulty of recording information<br>o Difficulty of interpreting information<br>o Interviewer time involvement<br>o One person collecting, recording, and analyzing information |

| | | |
|---|---|---|
| Telephone Interview | o Human touch<br>o Reach more people<br>o Succinct responses | o Limits the number of questions you can ask<br>o Limits the types of questions you can ask<br>o May necessitate call backs<br>o Danger of negative responses or false information |

Selecting the informal method(s) to use in assessing employee needs should be based upon the individual company situation and upon employee needs. Many times it is appropriate to use a number of informal methods of data collection. Data collection by one method can verify and clarify information collected by another method. For example, through the combined observations and report of department managers, supervisors, and even coworkers, it may be possible to define a more accurate and comprehensive picture of the employee's attitudes, abilities, and skills. And, because individuals tend to behave differently in different situations, it is helpful to be aware of variations in behavior patterns and to gain other views about the reasons for various behaviors.

## Informal Assessment: What Methods to Use

OBJECTIVE: List the advantages of various methods of informal assessment and identify the information provided through each.

REVIEW: Discuss the benefits of each method of informal assessment as they relate to an employee career development and assistance program.

ACTIVITY: Develop a form/worksheet that you could use, listing the methods of informal assessment and describing when, how and why you would use each in assessing employee needs, interests, attitudes and abilities.

CHECKLIST: You should have the following:

- An informal assessment strategy

REVIEW:

Review the advantage of using various informal information gathering techniques. Discuss with other trainees and colleagues the benefits of each as they relate to an employee career development and assistance program. Discuss the benefits as they relate to the following issues:

- Degree of personal contact desired
- Amount of information to be gathered
- Number of employees likely to be served
- Amount of counselor and employee time available
- Budget

Take notes during discussion to help you determine which informal assessment methods you will select.

When you have completed the REVIEW activities, discuss your conclusions with at least one other trainee. Solicit comments on your understanding and application of the concepts.

ACTIVITY:

1. List each method of informal assessment. Then, identify if, when and how you will use each method. Write a brief description of the kind of information you hope to acquire through each method.

### Informal Assessment Plan

| Method to use | Materials to use | Time Considerations | Information to Collect |
|---|---|---|---|
| Telephone | | | |
| | | | |
| | | | |
| Interview | | | |
| | | | |
| | | | |
| Other | | | |
| | | | |
| | | | |
| | | | |

2. Use the form on the following page as an example and construct a form that you'd use during an interview or telephone method.

CHECKLIST: Do you have the following:

| | Yes | No |
|---|---|---|
| o An informal assessment strategy | ___ | ___ |
| o A model information gathering protocol form | ___ | ___ |

## FORMAL ASSESSMENT INSTRUMENT DECISION GUIDE WORKSHEET

| Assessment Type | Instrument | Benefits |
|---|---|---|
| 1. Ability/Aptitude | 1. | |
| | 2. | |
| | 3. | |
| | 4. | |
| 2. Interest | 1. | |
| | 2. | |
| | 3. | |
| | 4. | |
| 3. Personality | 1. | |
| | 2. | |
| | 3. | |
| | 4. | |
| Informal Instruments from Previous Module | 1. | |
| | 2. | |
| | 3. | |

# OVERVIEW

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COMPETENCY #3: Select, modify, or develop appropriate formal assessment instruments and any instruction sheets that will be required to complete the instruments correctly

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In considering formal assessment, Tyler (1984) provides the following guiding principle for users of tests:

> What test scores give us are clues to be followed as we deal with the . . . adults for whose welfare we have some responsibility. The scores mean something, but in order to know what, we must consider each individual case in an empathic way, combining test evidence with everything else we know about the person. The practice of basing important decisions on test scores alone is unsound; so is the policy of dispensing with tests altogether. (p. 50)

A critical decision will be what assessment instruments to select--commercial, public domain or industry-specific. It may appear that a practical solution is to select an instrument that has already been developed and used. There certainly are advantages to doing this--paricularly if it is possible to find an instrument that parallels your experiences and is acceptable to and/or required by the employer and area educational institutions. Another advantage when using many of the commercially available instruments is the possibility of obtaining summary reports, which are helpful in analyzing the data for the employer for future training and education program planning.

## Selection and Development of Tests

While there are a variety of standardized tests from which to select, most of the commonly used tests fall into one of three categories:

- Ability tests. These instruments attempt to measure a person's overall ability, including general intelligence, achievement, aptitude, and reading ability. Some are administered individually and can only be given by a certified psychologist. Others are given to groups. In appraising adult career capabilities, it is particularly important that intelligence and aptitude tests have provided evidence of vocational validity--that they be predictive of occupational level or occupational aptitude patterns. Some examples of achievement tests include the Adult Basic Learning Examination (ABLE) and the Wide Range Achievement Test. Aptitude tests appropriate for adults include the General Aptitude Test Battery (GATB), Flanagan Industrial Tests (FIT), and the Computer Aptitude, Literacy, and Interest Profile (CALIP).
- Interest inventories. Standardized interest inventories help individuals identify their preferences for a particular activities. Suggestions are then made of the occupations or occupational clusters which most closely match one's interests. Some widely used surveys include the Kuder Occupational Interest Survey (KOIS), Strong-Campbell Interest Inventory (SCII), Self-Directed Search (SDS), Career Occupational Preference System (COPS), Career Assessment Inventory (CAI), Vocational Interest, Experience, and Skill Assessment (VIESA), System of Interactive Guidance and Information (SIGI PLUS), Apticom and the Passports to Your Future.
- Personality inventories. These instruments asses the emotional, social, and motivational aspects of an individual. Examples include the Myers-Briggs Type Indicator (MBTI), the Sixteen Personality Factor Questionnaire (16PF), and the California Personality Inventory (CPI).

Descriptions of these and other instruments appear in Appendix D.

In choosing appropriate formal assessment instruments, the employee assistance program and client goals both must be considered. It is imperative that counselors understand the technical strengths and limitations of the instrument, e.g., norms, reliability and validity, context, administration, and scoring. Counselors should also be aware of the background, purposes, and characteristics of the individuals to be assessed. Many adults have had little or no experience with tests and testing procedures and are understandably apprehensive. Therefore, timed tests especially may cause anxiety for these test takers. The reading level of tests presents another consideration. Some tests have written directions at a higher reading level than that of the test taker. Additionally, individual items may be at a relatively high reading level and may reflect cultural content of which the client may have little or no knowledge.

## Characteristics of A Quality Test

Test experts agree that a good test has the following characteristics:

- It must be valid. To the extent that a test measures what it is supposed to, it is valid.
- It should be reliable. Reliability is the consistency with which a test measures. Test experts indicate that a valid test is always reliable; that is, it consistently measures what it is supposed to measure. In fact, test developers treat reliability as a part of validity. It is important to know that a test can be reliable (can get a consistent measurement) even if it is not valid (does not measure what it is intended to measure).
- It should be free of bias. It should be sensitive to data on reliability, validity, and norms. The purpose of test standardization is to establish an objective instrument that measures or predicts behavior. Such standardization enables the user to compare individual test scores with a norm and to eliminate factors that would create test bias.

Because no test is completely bias-free, it is important to examine with what groups the norms were established.

- It should be usable. No matter how valid or reliable a test is, it will be of little use if it is unreasonably difficult or time-consuming to administer or score. While a final examination with 500 objective items could be valid and reliable, such a test might take so long to administer and score that it simply might not be practical or useful.
- It should be appropriate for the intended target group.

Attention should also be given to techniques of test administration. Preparation time should include a test orientation as well as attention given to seating, room temperature and lighting, and supplies, in order to limit discomfort and distractions. Review of the testing process and scoring procedures may also be helpful to test takers. The following topics could be covered: limitations of tests and test scores, the relevance of normative data for the particular instrument being administered, and implications for the individual.

## Formal assessment: What Instruments to Use

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**OBJECTIVE:** Identify specific tests to assess ability/ aptitude, interests, and personality and list guidelines for administering

**REVIEW:** Discuss the kinds of tests that are appropriate for employee assessment and the benefits of given tests.

**ACTIVITY:** List, describe, and assemble the specific standardized tests you would administer to employees.

**CHECKLIST:** You should have the following:

- A list of formal assessment instruments

---

REVIEW:

Review the characteristics of various types of standardized instruments commonly used in assessment. Discuss with other trainees the benefits of using each kind of instrument and the appropriateness of the tests for the organization's employees.

Also, read the descriptions of specific standardized tests in Appendix A. Check or list the tests that best serve your assessment purposes.

When you have completed the REVIEW activities, discuss your conclusions with at least one other trainee. Solicit comments on your understanding and application of the concepts.

ACTIVITY:

Using the form on the following page, list the employee characteristics you want to assess in formal assessment. Then, identify two to four instruments for each type of assessment you listed. Also, indicate the benefit of each instrument you listed. If you elect to develop your own instrument(s) for any type of informal assessment, also note these on the form.

Upon return to your office, assemble the assessment instruments you wish to use (together with instruction sheets). Keep them in a file marked Formal Assessment Instruments.

CHECKLIST: Do you have the following:

| | Yes | No |
|---|---|---|
| o A list of formal assessment instruments | ___ | ___ |

COMPETENCY #4: Specify how information and data collected from each method of assessment will be analyzed and communicated to the employee.

Once the tests have been administered, there are two essential tasks to consider: interpretation and communication.

Interpretation of Test Results.

The interpretation of test scores begins with understanding the basic characteristics of tests. It entails knowing about administering and scoring tests--the number of items involved, the time required, and the procedures for scoring. Also of help in interpretation of test results is knowledge about how and why each test was created, where it has been used, what kinds of populations have taken it, and what kinds of normative, reliability and validity data are available. Some of this information can be obtained by studying the appropriate test manual. However, typically formal assessments require that a counselor trained in psychological testing interpret the results.

Additionally, the publication Standards for Educational and Psychological Testing (APA 1985) published by the American Educational Research Association (AERA), The American

Psychological Association (APA), and the National Council on Measurement in Education (NCME) provides criteria for the evaluation of tests, testing practices, and the effects of test use. It outlines the following standards as primary for the use of tests in counseling:

- Counselors should review the interpretive materials provided to clients to evaluate accuracy, clarity, and usefulness of the materials. Manuals for tests or computer-based interpretations should be evaluated for evidence of the validity of specific interpretations.
- Counselors should review technical data and develop a rationale for the decision to use combined or separate norms for female and males in reports to test takers.
- If a publisher packages tests that are to be used in combination for counseling, the counselor should review the proposed rationale for the specific combination of tests and the justification of the interpretive relationships among the scores.
- Counselors should examine test manuals for any available information about how suggested or implied career options (i.e., the vocational program or occupation suggested by the highest score on the test) are distributed for samples of the typical respondents of each gender and relevant racial or ethnic groups.
- Counselors should review the interpretive materials for ability or interest measures and for other tests that are used with people who are reentering employment or education or changing work settings for their appropriateness for the individual. A counselor should consider the age, experience, and background of the employee as they are compared with the characteristics of the norm groups on which the scores are based. (APA 1985, pp. 56-58)

Standards considered primary for the counseling use of tests with linguistic minority persons (APA 1985) are as follows:

- For non-native English speakers or for speakers of some dialects of English, testing should be designed to minimize threats to test reliability and validity that may arise from language differences.

- Linguistic modifications recommended by test publishers should be described in detail in the test manual.

- When a test is recommended for use with linguistically diverse test takers, test developers and publishers should provide the information necessary for appropriate test use and interpretation.

- When a test is translated from one language or dialect to another, its reliability and validity for uses intended in the linguistic groups to be tested should be established.

- When it is intended that the two versions of dual-language tests be comparable, evidence of test comparability should be reported.

- English language proficiency should not be determined solely with tests that demand only a single linguistic skill. (APA 1985, pp. 74-75)

Standards considered primary for the counseling use of tests with people with handicapping conditions are as follows:

- Those who use tests and those who interact professionally with potential test takers with handicapping conditions should (a) possess the information necessary to make an appropriate selection of alternative measures, (b) have current information regarding the availability of modified forms of the test in question, (c) inform individuals with handicapping conditions, when appropriate, about the existence of modified forms, and (d) make these forms available to test takers when appropriate and feasible.

- In assessing characteristics of individuals with handicapping conditions, the test user should use either regular or special norms for calculating derived scores, depending on the purpose of the testing. Regular norms for the characteristic in question are appropriate when the purpose involves the test taker's functioning relative to the general population. If available, however, special norms should be selected when the test takers' functioning relative to their handicapped peers is at issue. (APA 1985, p. 80)

### Communication of Test Results.

Communication--feedback--consists of reporting data so that it is understandable, informative, and useful. In providing feedback, consideration should be given to the employee's need for the information and to the purposes for evaluating the significance of that information for educational planning. Discussion with employees should focus on the meaning of the test results as they relate to the employee's future goals and should caution the employee against relying solely on test scores when making possible training-related decisions. The counselor should encourage the employee to consider other relevant information on personal and social skills, values, interests, accomplishments, experiences, and on other test scores and observations in developing his/her plans.

Also, the employee under assessment should be informed regarding who--if anyone--will have access to the results and what safeguards will be initiated to prevent misuse. Confidentiality is essential in all dealings with employees in the program, including assessment.

## Assessment Results: Interpretating and Communicating

---

**OBJECTIVE:** Outline your strategy for interpreting and communicating test results.

**REVIEW:** Read the instructions for interpreting the tests you have selected for use and determine the tests you will and won't interpret yourself.

**ACTIVITY:** List the steps you will follow to interpret given tests.

**CHECKLIST:** You should have the following:

- A personal strategy for interpreting test results

---

## REVIEW:

Consider if you could use assistance in interpreting the tests you will select for use in this program. Determine if you are qualified to interpret the results of these tests. If not, you may consider getting area colleagues who have the qualifications and who might help initially in this special focused test interpretation activity.

Develop a list of general areas of test interpretation you could use help on. As you share these concerns with your workshop colleagues or when you return home, possibly more careative and appropriate ways could be identified.

| Test/Data | Areas That You Could Use Assistance On |
|---|---|
| 1. Interest (type) | |
| A. | |
| B. | |
| 2. Ability/Aptitude | |
| A. | |
| B. | |
| 3. Personality | |
| A. | |
| B. | |

When you have completed the REVIEW activities, discuss your conclusions with at least one other trainee. Solicit comments on your concerns and need for new ideas for interpretation.

ACTIVITY;

1. List the tests you will interpret using the following form. . Then list the steps you will follow to perform the interpretation. If you plan to use automated approaches to help interpret specific tests, note that fact also.

2. Next, list below the three most important points to keep in mind when communicating test results to employees.

| Test Interpretation Methods | Concerns Regarding Using This Method |
|---|---|
| 1. Counseling Session | o<br>o<br>o |
| 2. Report (paper) feedback with instructions for employee's individual review. | o<br>o<br>o |
| 3. Use of external person or agency to conduct interpretation (e.g., scoring service interpretation information per-packaged | o<br>o<br>o |
| 4. Use of visual and/or computer approaches to test interpretation | o<br>o<br>o |

CHECKLIST:

| Do you have the following: | Yes | No |
|---|---|---|
| o A strategy for interpreting and communicating test results. | _____ | _____ |
| o A list of general concerns regarding various methods of test interpretation | _____ | _____ |

## EMPLOYEE PLAN FOR TEST INTERPRETATION

| Test/Instrument You Will Use | Interpretation Methods that Appear Appropriate | Rationale For Using This Method |
|---|---|---|
| 1. Interest | | |
| 2. Ability | | |
| 3. Aptitude | | |
| 4. Personality | | |
| 5. | | |
| 6. | | |

Appendix A

## INSTRUMENT DESCRIPTIONS

Several instruments are described on the following pages according to this format:

- Name of instrument
- Author
- Source
- Purpose
- Primary user population
- Description of materials
- Technical information
- Advantages/disadvantages
- Sources of additional information

Information for the instrument descriptions was synthesized from instrument manuals and supporting materials, journals (*Measurement and Evaluation in Counseling and Development*, formerly *Measurement and Evaluation in Guidance*, was especially useful), and general sources, such as Backer (1979), Bhaerman (1981), Botterbusch (1980), Buros (1978), Kapes and Mastie (1982), and Swirsky and Vandergoot (1980).

The instrument descriptions are arranged in alphabetical order by the name of the instrument. The descriptions are summarized by instrument type, by administration time, by reading level, and by scoring procedures in Appendix B.

No cost information for the use of the assessment instruments has been provided because specific prices change almost constantly. Generally, paper-and-pencil instruments that can be hand scored are least expensive; instruments that require machine scoring have costs associated with the scoring; systems that require equipment, in addition to paper-and-pencil forms, are more expensive; and the fully computerized instrument systems are the most expensive. Readers who are interested in obtaining cost figures should contact the publisher directly. Often publishers will provide free review copies of materials, particularly if there is the possibility that extensive use will be made of the materials. Readers can also review instruments at major professional association convention exhibits, for example, the American Association of Counseling and Development (AACD) convention.

All of the instruments described in the following pages have been used in adult career counseling programs, although all program personnel have not been particularly satisfied with individual instruments. It is necessary, therefore, to determine which instruments will provide the best information for your clients. Use the standards and information presented earlier in this publication in making this decision.

| | |
|---|---|
| **NAME** | Adult Basic Learning Examination (ABLE) |
| **AUTHORS** | Bjorn Karlson, Richard Madden, and Eric F. Gardner |
| **SOURCE** | The Psychological Corporation<br>7500 Old Oak Boulevard<br>Cleveland, OH 44130 |
| **PURPOSE** | ABLE measures basic learning skills of undereducated adults. It was developed as a general aptitude screening device for determining training needs or placement options. |
| **PRIMARY USER POPULATION** | Adults |
| **DESCRIPTION OF MATERIALS** | ABLE is a paper-and-pencil test measuring five areas: vocabulary; spelling; reading; and arithmetic, which contains computation and problem solving. Content centers on situations common to adult daily life. The ABLE has three levels: grades 1-4, 5-8, and 9-12. Two forms are available for each level. A 15-minute screening device called the "Select-ABLE" has been developed for use in determining the appropriate level for individuals. ABLE is designed so that minimal reading is involved. The Vocabulary Test is dictated at all levels to provide a measure independent of reading ability. Levels I and II are untimed and take about 2 hours to complete. Level III takes approximately 3 1/2 hours to complete and requires a separate answer sheet. Levels I and II are hand scored only. Level III is machine scored using an IBM 805. Raw scores are converted into grade scores identifying the grade level at which individuals are functioning in each area tested. |
| **TECHNICAL INFORMATION** | Grade norms for Levels I and II were developed through correlation with the Stanford Achievement Test (SAT). Percentile and stanines for Level III were obtained through correlation with the SAT High School Battery. Adult norms for each level are provided for specific groups. Split-half reliability coefficients generally fall within the range of .84 to .98 with the exception of one coefficient of .73 in the Problem-Solving Test for one study group. No validity data are presented in the manual. |
| **ADVANTAGES/ DISADVANTAGES** | ABLE was specifically developed for use with undereducated adults and has content geared toward this population. |
| **ADDITIONAL INFORMATION** | Backer, Thomas E. *Client Assessment: A Manual for Employment and Training Agencies*. Los Angeles: Edward Glaser and Associates, 1979, pp. 8-9.<br>Bhaerman, Robert D. *Testing in Employment and Training Programs: An Action Planning Guidebook*. Columbus: The National Center for Research in Vocational Education, The Ohio State University, 1981, p. 63. |

**NAME** Apticom

**AUTHOR AND SOURCE**

Vocational Research Institute
2100 Arch Street
Philadelphia, PA 19103

**PURPOSE** Apticom is designed to assess aptitudes, job interests, and math and language skills.

**PRIMARY USER POPULATION** High school students and adults

**DESCRIPTION OF MATERIALS** Apticom is a microcomputer assessment instrument. It consists of three major components: an Aptitude Test Battery, Occupational Interest Inventory, and Educational Skills Development Battery. The entire system can be administered in approximately 1 1/2 hours.

The Aptitude Test Battery contains 11 tests measuring 9 aptitudes. The aptitudes are as follows: general learning, verbal, numerical, spatial, form perception, clerical perception, motor coordination, finger dexterity, and manual dexterity. Manipulative, cognitive, and perceptual tests are interspersed within the battery. These tests require the use of seven test panels, the answer probe, the finger or manual switch, the dexterity module or parts, and the foot switch or foot control. Most of the aptitude tests are in a multiple-choice format. All of the aptitude tests are self-scoring and self-timing. Tests are automatically terminated when time is up. Practice exercises must be timed manually.

The Occupational Interest Inventory contains 162 items that represent 12 interest areas: artistic, scientific, plants and animals, protective, mechanical, industrial, business detail, selling, accommodating, humanitarian, leading and influencing; and physical performing. Each of the six panels used lists a series of activities and occupations. Individuals respond by inserting the probe under "like," "dislike," or "?" (indicating they are unsure of how they feel about the item). The Occupational Interest Inventory is self-scoring only. This component is not timed.

The Educational Skills Development Battery (ESDB) contains a Language Test (10 minutes) and a Math Test (15 minutes). Each contains 30 multiple-choice items. The ESDB is self-timing and self-scoring.

Apticom records, converts, and interprets scores. The Aptitude Test Battery report shows raw scores, number of items attempted, and standard scores. Results are graphed in an individual profile. The Occupational Interest Inventory report shows interest area scores and percentiles, an interest profile, and an individual profile analysis. The ESDB report shows the maximum score, the number of items attempted, and the number answered correctly. It also shows the level of skill achieved as compared with the Department of Labor (DOL) General Educational Development (GED) scale definitions. The Apticom report contains a Performance Analysis that has a breakdown of correct responses by item type. The Vocational Recommendations Report summarizes and integrates the results of the three Apticom components. Results are compared to DOL Occupational Aptitude Patterns (OAPs), the *Guide for Occupational Exploration* (GOE) Work Groups, and the *Dictionary of Occupational Titles* (DOT). Specific Vocational Preparation (SVP) required is specified for vocational recommendations.

Interpretive data are provided in the report and in the Apticom manuals. Apticom can be hand scored. Instructions and conversion tables are in the *Operation, Administration, and Scoring Manual*.

**TECHNICAL INFORMATION**

The Apticom console is compatible with an RS-232-C serial interface printer. Apticom receives commands through switch positions and the use of panels, answer probe, foot switch, and dexterity box. Extensive operational and technical data are provided in the *Operation, Administration, and Scoring Manual*, and the *System Technical Manual*. Technical information is presented separately for each of the three components.

The Aptitude Test Battery was designed to yield scores comparable to the aptitude norms of the DOL Occupational Aptitude Pattern structure. The Aptitude Test Battery was correlated with the General Aptitude Test Battery (GATB). Validity coefficients range from .37 (motor coordination) to .87 (general learning ability). Reliability coefficients range from .65 (finger dexterity) to .89 (verbal).

The Occupational Interest Inventory was normed on two samples: secondary school students (n=856) and adults (n=525). Validity coefficients based on correlations with the United States Employment Service (USES) Interest Inventory range from .70 (industrial) to .85 (humanitarian). Reliability coefficients were calculated for internal consistency with a mean of .86, and for test/retest reliability with a mean of .83. The time interval between the test/retest administrations is not specified in the manual.

The ESDB development was based on DOL GED scale definitions. Content validity analysis was conducted by vocational evaluation and language specialists. No reliability data are available. Research is currently being conducted.

**ADVANTAGES/ DISADVANTAGES**

The Apticom tests appear to be excellent career guidance instruments. The ESDB and aptitude tests target those who are not college bound. The language and math tests extend from GED levels one through four (through high school). Levels five and six (college) are excluded. Because of its link to the DOT and GOE, extensive occupational data are available for further exploration.

**ADDITIONAL INFORMATION**

*Apticom: System Operation, Administration, and Scoring Manual*. Philadelphia: Vocational Research Institute, 1985.

*Apticom: System Technical Manual*. Philadelphia: Vocational Research Institute, 1985.

| | |
|---|---|
| **NAME** | Basic English Skills Test (BEST) |
| **AUTHOR** | Center for Applied Linguistics |
| **SOURCE** | Harcourt Brace Jovanovich<br>International Division<br>Orlando, Florida 32887 |
| **PURPOSE** | BEST assesses adult English language proficiency in four skill areas: listening, speaking, reading, and writing. BEST can be used to place new students into English Language courses, assess the progress of continuing students, or provide diagnostic feedback on students' acquired English language skills. |
| **PRIMARY USER POPULATION** | Limited English-speaking adults (speakers of other languages) |
| **DESCRIPTION OF MATERIALS** | BEST is a competency-based test, consisting of two sections: a core section and a literacy skills section. The core section is an individually administered oral interview that takes 10-15 minutes to administer. It includes listening tasks, speaking tasks, reading tasks, and writing tasks. The speaking tasks cover such topics as telling time, asking for directions, handling money, and conversing socially. The reading and writing tasks serve as a screening device to determine the appropriateness of the literacy skills section.<br>The literacy skills section can be administered individually or in a group and requires approximately 45 minutes to complete. A booklet with photographs and written questions about the photographs is included. Questions are based on real-life tasks such as reading food and clothing labels, want ads, and job applications. There is also a writing component to the literacy skills section that includes such tasks as addressing an envelope, writing rent checks, completing applications, and writing a short biographical sketch.<br>Both sections of the test are hand scored. |
| **TECHNICAL INFORMATION** | The *BEST Test Manual* describes test administration, scoring, and interpretation. Topics, linguistic elements, and consequent test items were developed cooperatively by a group of ESL teachers, administrators, and test developers. The sample population was 217 for the core section and 101 for the literacy section. Internal consistency (KR-20) reliability estimates range from .95 to .97 for the core section and .58 (writing) and .93 (reading) for the literacy section. |
| **ADVANTAGES/ DISADVANTAGES** | The test was designed for a very specific population: adults with limited English-speaking capabilities who wish to participate in bilingual vocational training programs. It does have wider applications with other limited English-speaking adults. It appears useful for persons with no English-speaking skills to those who have some background. |
| **ADDITIONAL INFORMATION** | *Basic English Skills Test: Test Manual*. Washington, DC: Center for Applied Linguistics, 1982. |

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|---|---|
| **NAME** | Career Assessment Inventory (CAI) |
| **AUTHOR** | Charles B. Johansson |
| **SOURCE** | NCS Professional Assessment Service<br>P.O. Box 1416<br>Minneapolis, MN 55440 |
| **PURPOSE** | CAI is designed for those individuals who want immediate career entry or for those who want careers that require minimum postsecondary training. Client interests are compared to workers in occupations requiring less than a 4-year college education. |
| **PRIMARY USER POPULATION** | Grade eight through adults |
| **DESCRIPTION OF MATERIALS** | CAI is a paper-and-pencil inventory that takes 30-40 minutes to complete. The CAI includes three categories: activities, school subjects, and occupational titles. Each item listed in a category can be ranked five ways—from "like very much" to "dislike very much." This interest inventory is scored on 5 types of scales: general occupational themes (Holland's 6 vocational types), 22 basic interests scales, 91 occupational scales, administrative indexes, and special scales. These scales are appropriate for either sex because the CAI offers combined gender scales that ensure clear definitions among occupations and not gender differences. The inventory is written at a sixth-grade reading level.<br>Scoring may be done in three ways: (1) by using the mail-in scoring and reporting, which takes 5 days maximum plus mail time; (2) by Arion II teleprocessing (this system can be used with almost any microcomputer or terminal); and (3) by Microtest, which is assessment software providing several administrative options and offering immediate onsite scoring. There are two reports that can be obtained. A Narrative Report provides scales, interpretations, and comparisons and reference information. The Profile Report is a graphic representation of scale scores with interpretive information on the reverse side. Also offered are group reports with comparisons of all scores.<br>CAI is also available in Spanish and French. |
| **TECHNICAL INFORMATION** | Norm groups consisted of workers in occupational groups, and the general population. Test/retest reliability is reported to be at or above .90. Validity data are also well documented, although predictive data are absent. |
| **ADVANTAGES/ DISADVANTAGES** | This is an excellent interest inventory for those clients who do not have 4-year degree aspirations. By using this inventory, clients will not be scored on occupations for which they do not qualify. |
| **ADDITIONAL INFORMATION** | Bodden, Jack. "A Test Review of The Career Assessment Inventory." In *The Eighth Mental Measurements Yearbook*, edited by O.K. Buros, entry 993. Highland Park, NJ: Gryphon Press, 1978. |

**ADDITIONAL INFORMATION**

Knapp, Lila, and Knapp, Robert R. *Technical Manual: Career Ability Placement Survey*. San Diego, CA: EdITS, 1984.

Knapp, Lila; Knapp, Robert R.; Strand, Len; and Michael, William B. "Comparative Validity of the Career Ability Placement Survey (CAPS) and the General Aptitude Test Battery (GATB) for Predicting High School Course Marks." *Educational and Psychological Measurement* 38 (1978): 1053-1056.

Knapp, Robert R.; Knapp, Lila; and Michael, William B. "Stability and Concurrent Validity of the Career Ability Placement Survey (CAPS) Against the DAT and the GATB." *Educational and Psychological Measurement* 37 (1977): 1081-1085.

**NAME** Computerized Heuristic Occupational Information and Career Exploration System (CHOICES II)

**AUTHOR AND SOURCE**

CSG Corporation
Suite 209
277 South Washington
Alexandria, VA 22314

**PURPOSE** CHOICES II is designed to assist in the process of career exploration through the development of a profile of career needs. It then provides occupational data related to the user's profile.

**PRIMARY USER POPULATION** Junior high school students through adults

**DESCRIPTION OF MATERIALS** The CHOICES system uses both paper-and-pencil activities and a computer program. A user first completes a career assessment workbook called the *CHOICES Guide*. This assists in the assessment of 16 career-related topics: education level; work site; physical demands; temperament; earnings; aptitudes; interests; future outlook; Holland categories (realistic, enterprising, investigative, social, artistic, and conventional); career fields; physical activities; hours of work/travel; environment; training required; similar occupations; and summary of work. Completion of the exercises results in a profile of career needs and a route map for more in-depth career exploration. The profile is used to access information through one or more of four available routes: explore, specific, compare, and related.

**Explore** identifies possible careers related to topics 1-13 of the CHOICES profile. Topics are entered in order of importance. Each entry shows the number of occupations both prior to and after the response. Eventually, the number of related occupations will be narrowed down to 30 or less, at which point a list of occupations can be printed. At key points, a user can change answers, add or delete specific criteria, and find out why certain occupations were not included in the list provided. When any criteria are changed, the number of occupations may change and a new list is printed. A user is encouraged to develop more than one list of occupations and to compare these for occupations appearing more than once.

**Specific** provides detailed information on any occupation identified by the user. Occupations and code numbers are listed in the Master List of Occupations, or results of the **explore** route can be used. Each description provides data related to each of the 13 search topics; a summary of work performed; training requirements; and a listing of similar occupations in the *Dictionary of Occupational Titles* (DOT), *Occupational Outlook Handbook* (OOH), and in the military. (The Master List of Occupations may also be used in **compare** and **related**.)

**Compare** allows the user to compare the characteristics of two occupations at a time. It provides references to the DOT and OOH and similar occupations in the military.

**Related** allows the user to find occupations with characteristics similar to those of an occupation of interest.

In addition to occupational information, an education component and military file are also available. The education component contains graduate and undergraduate files. Two routes are available to access data: **explore** and **specific**. "Explore" is based on 11 topics pertinent to choice of college (i.e., location, programs, expenses). The graduate file uses only 5 of the 11 topics in the undergraduate file. The military file uses only the **specific** route, providing descriptive data about military occupations.

**TECHNICAL INFORMATION**

CHOICES II is available in hard disk or floppy disk versions. Hard disk can be used with IBM or Apple microcomputers. The floppy disk is used with Apple II, Commodore 64, Commodore Pet/8032, IBM PC, or TRS-80, models III/IV.

**ADVANTAGES/ DISADVANTAGES**

The CHOICES system combines a paper-and-pencil inventory with a computer program. The *CHOICES Guide* offers a step-by-step system to assist individuals in self-assessment. The workbook offers clear instructions and relates each of the 16 career-related topics to specific activities. It also provides a review of the system and some suggestions for further exploration.

**ADDITIONAL INFORMATION**

Maze, Marilyn, and Cummings, Roger. *How to Select a Computer-Assisted Career Guidance System*. Madison: Vocational Studies Center, University of Wisconsin-Madison, 1982, pp. 138, 142.

Shatkin, Laurence. *Research Report, Computer-Assisted Guidance: Descriptions of Systems*. Princeton, NJ: Educational Testing Service, 1980, pp. 6-11.

Zunker, Vernon G. *Career Counseling: Applied Concepts of Life Planning*. Monterey, CA: Brooks/Cole, 1981, pp. 150-151.

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|---|---|
| **NAME** | Computer Aptitude, Literacy, and Interest Profile (CALIP) |
| **AUTHORS** | Mary S. Poplin, David E. Drew, and Robert S. Gable |
| **SOURCE** | PRO-ED<br>5341 Industrial Oaks Boulevard<br>Austin, TX 78735 |
| **PURPOSE** | CALIP was developed to assess computer-related abilities essential for a wide variety of computer-related occupations. |
| **PRIMARY USER POPULATION** | Age 12 through adults |
| **DESCRIPTION OF MATERIALS** | CALIP is a paper-and-pencil test containing 138 items. The CALIP can be completed in approximately 1 hour. The six subtests are Estimation (24 items), Graphic Patterns (20 items); Logical Structure (20 items), Series (24 items), Interest (20 items), and Literacy (30 items). The Estimation Subtest requires the individual to estimate the number of dark squares in a group of squares. This is the only timed portion of the test. The Interest section requires an answer of "agree" or "disagree" or a forced-choice response to one of two activities. The other subtests call for multiple-choice responses. An optional computer experience survey is contained on the back of the answer sheet. The answer sheet is hand scored. Tables are provided in the manual for converting raw scores to standard scores and additional interpretive information is included. |
| **TECHNICAL INFORMATION** | CALIP was standardized on a sample of over 1,200 children and adults. Four analyses of reliability are presented in the CALIP manual. Split-half reliabilities range from .80 to .95 with the exceptions of the Series and Literacy scores at the youngest age range (.75, .76). Alpha coefficients range from .85 to .93 except for the youngest age group, which has a range of .72 to .78. Test/retest reliability coefficients were low for the two younger groups (combined to yield .50). The two upper age groups yielded a coefficient of .88. The low score has been attributed to the relative instability of interest at a young age. The standard error of measurement ($SE_m$) is below 2.8 for standard and raw scores, and is 4.0 for the computer aptitude quotient (composite standard score of the CALIP). Validity data presented in the manual study the basic constructs underlying the CALIP subtests and seven related variables. The median correlation was .34. The variables tested were age, gender, computer skill, experience, knowledge, course work, and experience in program writing. No predictive validity data are available. |
| **ADVANTAGES/ DISADVANTAGES** | CALIP provides a measure of computer aptitude, literacy, and interests. It was designed to identify minorities, women, reading disabled, and others who might lack an opportunity to demonstrate aptitude for computer-related occupations; to broaden the range of career options in the career decision-making process; and to document progress in training. |
| **ADDITIONAL INFORMATION** | Poplin, Mary S.; Drew, David E.; and Gable, Robert S. *CALIP Computer Aptitude, Literacy, and Interest Profile Manual*. Austin, TX: PRO-ED, 1984. |

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|---|---|
| **NAME** | Flanagan Industrial Tests (FIT) |
| **AUTHOR** | John C. Flanagan |
| **SOURCE** | Science Research Associates, Inc.<br>ISED Marketing/9th Floor<br>155 North Wacker Drive<br>Chicago, IL 60606 |
| **PURPOSE** | FIT measures skills considered critical for performance in a wide variety of jobs. The primary use of the test is for selecting personnel to perform certain jobs. |
| **PRIMARY USER POPULATION** | Designed primarily for adults, although norms are available for male college freshmen and for high school seniors |
| **DESCRIPTION OF MATERIALS** | FITs are shortened, timed versions of the Flanagan Aptitude Classification Tests (FACT). The FIT is a paper-and-pencil instrument that consists of 18 subtests: Arithmetic, Assembly, Components, Coordination, Electronics, Expression, Ingenuity, Inspection, Judgment and Comprehension, Mathematics and Reasoning, Mechanics, Memory, Patterns, Planning, Precision, Scales, Tables, and Vocabulary. Administration time is from 5 to 15 minutes per scale.<br>FIT is self-administering. The tests are timed and a stopwatch is necessary for administration. Scoring is completed by use of an overlay stencil.<br>The user needs to determine which subtests are appropriate for selecting applicants for certain jobs. Job analysis should be completed in order to determine the elements of the job. Then the appropriate subtests relevant to these components can be identified. It is recommended that several subtests be used and that selection decisions not be based on one subtest. Local validation studies should be conducted to determine the appropriate subtests and cutoff scores. |
| **TECHNICAL INFORMATION** | Three sets of norms have been established for 14 of the 18 subtests of the FIT: personnel from business and industry, male college freshmen, and high school seniors. For the business and industry norms, separate scores are reported for minority group members. In addition, the results of 25 validation studies with various occupations are reported in the *Examiner's Manual*. Reliability data were obtained by comparing the FIT and FACT subtests. The correlations range from .28 to .79 with an average of .55. The correlations are low because of differences in length, difficulty, and types of items between the FIT and FACT. More extensive data are available from the *Examiner's Manual* (Flanagan 1975). |
| **ADVANTAGES/ DISADVANTAGES** | FIT is primarily used to select applicants for jobs. It appears to be well qualified for this task. The subtests are short and easy to administer. Some knowledge of testing procedures is required in order to select appropriate subtests. Incomplete validity and low reliability data make the use of the test questionable, but local validation of subtests could compensate. |

**ADDITIONAL INFORMATION**

Flanagan, John C. *Flanagan Aptitude Classification Tests: Technical Report.* Chicago: Science Research Associates, 1959.

———. *Flanagan Industrial Tests: Examiner's Manual.* Chicago: Science Research Associates, 1975.

Herman, David O. "A Test Review of the Flanagan Industrial Tests." In *The Eighth Mental Measurements Yearbook*, edited by O.K. Buros, entry 981. Highland Park, NJ: Gryphon Press, 1978.

MacKinney, Arthur C. "A Test Review of the Flanagan Industrial Tests." In *The Eighth Mental Measurements Yearbook*, edited by O.K. Buros, entry 981. Highland Park, NJ: Gryphon Press, 1978.

Zunker, Vernon G. *Career Counseling: Applied Concepts of Life Planning.* Monterey, CA: Brooks/Cole Publishing Company, 1981, p. 118.

**NAME**

General Aptitude Test Battery (GATB)

**AUTHOR**

United States Employment Service (USES)

**SOURCE**

U.S. Government Printing Office
Washington, DC 20402

**PURPOSE**

GATB is a measure of general learning ability and aptitudes required for occupational success developed for use in career counseling.

**PRIMARY USER POPULATION**

Grade nine through adult

**DESCRIPTION OF MATERIALS**

GATB is a combined paper-and-pencil and apparatus test with the following parts: general learning ability, verbal, numerical, spatial, form and clerical perception; motor coordination; and finger and manual dexterity. It is a timed test with a total administration time of about 2 1/2 hours. GATB is hand scored or machine scored through NCS Professional Assessment Service, P.O. Box 1416, Minneapolis, Minnesota, 55440. The counselor compares scores to Occupational Aptitude Patterns (OAPs) and Specific Aptitude Test Batteries (SATBs), which are clusters of similar occupations and specific occupations, respectively. OAPs consist of three GATB aptitudes indicating aptitudes for specific occupations. These patterns relate to the needed aptitudes for specific occupations in the *Dictionary of Occupational Titles* (DOT). A pass-fail criterion of **H**, **M**, and **L** has been used with the GATB, with the middle category used for passing. **H** means that scores are equal to or exceed those of workers judged satisfactory in those occupations; **M** means that scores are close to those of workers; and **L** indicates that scores are similar to or below those of workers.

**TECHNICAL INFORMATION**

Norms are based on employed workers in more than 460 occupations. Form A of the GATB was normed on a representative sample of 4,000. Form B is a parallel form that is matched to Form A through a conversion table. Extensive test/retest reliability data are presented with coefficients ranging from the mid- .70s to .90. Validity studies are presented on over 400 occupations. Cutoff scores were established to form SATBs and OAPs. Tables of validity studies typically show modest but significant relationships between GATB pass-fail predictors and actual occupational outcome.

**ADVANTAGES/ DISADVANTAGES**

Because the GATB tests are timed, scores are likely to be depressed for older adults or those with little testing experience. Testing must be done by the Bureau of Employment Services or a certified examiner.

**ADDITIONAL INFORMATION**

Borgen, Fred H. "Review of the USES General Aptitude Test Battery." In *A Counselor's Guide to Vocational Guidance Instruments*, edited by Jerome T. Kapes and Marjorie Moran Mastie, pp. 43-46. Falls Church, VA: American Personnel and Guidance Association, 1982.

U.S. Department of Labor. *Manual for the General Aptitude Test Battery, Section III: Development*. Washington, DC: Government Printing Office, 1970.

———. *Guide for Occupational Exploration*. Washington, DC: Government Printing Office, 1979.

———. *Manual for the General Aptitude Test Battery, Section II: Occupational Aptitude Pattern Structure*. Washington, DC: Government Printing Office, 1979.

———. *Manual for the General Aptitude Test Battery, Section IIA: Development of Occupational Aptitude Pattern Structure*. Washington, DC: Government Printing Office, 1980.

———. *Manual for the General Aptitude Test Battery, Section IV: Specific Aptitude Test Batteries*. Washington, DC: Government Printing Office, 1980.

Weiss, David J. "A Test Review of The General Aptitude Test Battery." In *The Seventh Mental Measurements Yearbook*, edited by O.K. Buros, entry 676. Highland Park, NJ: Gryphon Press, 1972.

**NAME** Minnesota Importance Questionnaire (MIQ)

**AUTHORS** D. J. Weiss, Rene V. Dawis, and Lloyd H. Lofquist

**SOURCE**
Vocational Psychology Research
University of Minnesota
N620 Elliott Hall
75 East River Road
Minneapolis, MN 55455

**PURPOSE** MIQ measures 20 psychological needs. The needs can be defined as the specific conditions in a work environment that are considered important to job satisfaction.

**PRIMARY USER POPULATION** Age 16 through adult

**DESCRIPTION OF MATERIALS** MIQ is a self-administered questionnaire that takes 30-40 minutes to complete. There are two formats of the MIQ available, both written at a fifth-grade reading level. The first format utilizes paired comparisons. Clients choose the statement in each pair they consider to be more important in their ideal job. There are 190 items in this format. The second format is a ranked-order form. Clients rank, in order of importance, blocks of five statements at a time. There are 105 items in this format. Both formats have a section where clients look at each of the 20 need statements and choose those important to their ideal job.

Both formats must be machine scored through the publisher. This takes 1 day plus mail time. Research accompanying the MIQ states that the two formats generally show similar results and that most clients prefer the ranked-order form. Clients will receive a report that contains needs profile and interpretive data.

**TECHNICAL INFORMATION** The MIQ manual presents considerable data on reliability and validity. Internal consistency coefficients range from .77 to .81 for all scales. Test/retest reliability ranges from .19 to .93 for a 9-month interval and immediate retest, respectively. Stability coefficients of the MIQ profiles range from .70 (4-month interval) to .95 (immediate retest). Scale intercorrelations had a median of .33. Data on validity are not as complete, though the information presented in the manual does support the validity of the MIQ. Some studies indicate that four occupational groups have MIQ profiles that correspond to their occupational reinforcer patterns.

**ADVANTAGES/ DISADVANTAGES** This questionnaire would be useful in a vocational guidance setting to identify the types of occupations clients would find most satisfying. The needs profile might also be used by counselors to help clients identify a satisfying way to spend nonwork time. This might be especially helpful when, because of a disability or other problem, clients are limited in their choice of occupation. Clients who are unable to find satisfaction in the workplace may then be able to utilize this profile to find satisfaction away from the workplace.

**ADDITIONAL INFORMATION**

Albright, Lewis E. "A Test Review of the Minnesota Importance Questionnaire". In *Eighth Mental Measurements Yearbook*, edited by O.K. Buros, entry 1050. Highland Park, NJ: Gryphon Press, 1978.

————. "Review of Minnesota Importance Questionnaire." In *A Counselor's Guide to Vocational Guidance Instruments*, edited by Jerome T. Kapes and Marjorie Moran Mastie, pp. 107-109. Falls Church, VA: American Personnel and Guidance Association, 1982.

Swirsky, Jessica, and Vandergoot, David. *A Handbook of Placement Resources*. Albertson, NY: Human Resources Center, 1980, pp. 41-43.

Zedeck, Sheldon. "A Test Review of the Minnesota Importance Questionnaire." In *The Eighth Mental Measurements Yearbook*, edited by O.K. Buros, entry 1050. Highland Park, NJ: Gryphon Press, 1978.

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| **NAME** | Myers-Briggs Type Indicator (MBTI) |
| **AUTHORS** | Isabel Briggs Myers and Katherine C. Briggs |
| **SOURCE** | Consulting Psychologists Press<br>577 College Avenue<br>Palo Alto, CA 94306 |
| **PURPOSE** | MBTI was designed to identify an individual's basic preferences by measuring personality dispositions and interests. It is based on Jung's theory of personality types. |
| **PRIMARY USER POPULATION** | Age 10 through adult |
| **DESCRIPTION OF MATERIALS** | MBTI is an untimed, self-administered assessment and screening instrument that takes approximately 30 minutes to complete. It contains 166 forced choice items in 4 indexes: introversion-extraversion (IE), sensing-intuition (SI), thinking-feeling (TF), and judging-perceptive (JP). The higher scores in each of the 4 scales constitute the 4 component personality types (16 types are possible). Results can be hand scored or machine scored through NCS Professional Assessment Service, P.O. Box 1416, Minneapolis, Minnesota 55440, in 1 day plus mail time. Immediate scoring using Arion II teleprocessing is also available. Hand-scoring keys contain conversion tables for obtaining the preference score. The MBTI Profile Report graphs preference strengths and provides a detailed narrative on the individual's type. The *MBTI Manual* provides extensive interpretive data linking types to occupations, work situations, and other variables. MBTI is also available in a microcomputer edition. It can be administered and scored on the computer for immediate feedback. |
| **TECHNICAL INFORMATION** | Extensive technical data are provided in the MBTI manual. Normative data are provided by sex and group for each scale. Four major groups (junior and senior high school, college, and adult) are subdivided further into more descriptive categories such as major or occupation. Additional normative data based on samples of over 2,000 males and females are available in the *Supplementary Manual*. Split-half reliability coefficients are presented for some groups. Coefficients range from .44 (underachieving 8th graders) to .94 (advanced 12th graders). The low reliabilities in the thinking-feeling (TF) index may be partially explained in that "the development of judgment is one of the slowest and most reluctant achievements in the process of growing up" (see Myers 1977). Extensive correlation studies are documented in the *MBTI Manual*. The newer *Supplementary Manual* indicates that validity of the MBTI has not diminished. |
| **ADVANTAGES/ DISADVANTAGES** | The MBTI is also available in a shorter version containing 126 items. This version (Form G) can be used when time and/or reading level make the long form inappropriate. MBTI is based on the theory that occupations attract particular types and that similar occupations have similar types. |

**ADDITIONAL INFORMATION**

Coan, Richard W. "A Test Review of the Myers-Briggs Type Indicator." In *The Eighth Mental Measurements Yearbook*, edited by O.K. Buros, entry 630. Highland Park, NJ: Gryphon Press, 1978.

Myers, Isabel Briggs. *The Myers-Briggs Type Indicator Manual*. Palo Alto, CA: Consulting Psychologists Press, 1962.

———. *Supplementary Manual: The Myers-Briggs Type Indicator*. Palo Alto, CA: Consulting Psychologists Press, 1977.

**NAME**

The Sixteen Personality Factor Questionnaire (16 PF) Form A

**AUTHORS**

Raymond B. Cattell, Herbert W. Eber, and Maurice M. Tatsuoka

**SOURCE**

Institute for Personality and Ability Testing
1602 Coronado Drive
P.O. Box 188
Champaign, IL 61820

**PURPOSE**

The 16 PF measures 16 personality traits and provides descriptions of distinctive primary personality characteristics, an evaluation of general criteria, and recommendations regarding occupational success and achievement potential.

**PRIMARY USER POPULATION**

Age 16 through adult

**DESCRIPTION OF MATERIALS**

The 16 PF is a paper-and-pencil questionnaire that contains 187 items and takes approximately 45-60 minutes to complete. Items are in an alternate choice format. Answers are marked on a separate answer sheet. These are either hand scored with a stencil or machine scored through the publisher in 1-2 days plus mail time. The 16 PF is scored in a bipolar format containing low and high score descriptions (i.e., "reserved-outgoing," "less intelligent-more intelligent," "relaxed-tense"). Results are in narrative form and are also graphed on a test profile that includes raw score, standard score, and standard 10 score. An additional narrative report, the Personal Career Development Profile (PCDP), discussed earlier, is also available. PCDP was designed specifically for vocational planning and career exploration purposes. It contains a narrative description of a general life-style for coping with personal and work environments, sources of satisfactions, work setting and structure preferences, and patterns of interests. It also provides suggestions for achieving career success and contains information comparing individual results with workers in occupations and with other people similar in age and sex.

The 16PF is available in a microcomputer edition. Administration and scoring are done at the computer for immediate feedback.

**TECHNICAL INFORMATION**

Extensive normative data are provided in *Tabular Supplement No. 1 to the 16 PF Handbook*. Separate norm tables are provided by education level or general population and by sex. Sample sizes range from 468 to 3,322. Three test/retest reliability studies show coefficients ranging from .61 to .92 (short interval) and .21 to .88 (long interval). Validity coefficients measuring construct validity range from .35 to .94. The handbook for the 16 PF contains additional technical data.

**ADVANTAGES/ DISADVANTAGES**

The 16 PF can be used in a number of different settings. Form A is the most commonly used; however, four additional forms (B, C, D, and E) are available. Forms A and B are written at a seventh- to eighth-grade reading level. Forms C and D are written at a sixth- to seventh-grade reading level and take 25-35 minutes to complete. Form E was developed for low-literate persons and is designed at a third- to fourth-grade reading level in a two-choice format. Form E can be administered orally. The Standard 16 PF Report Format provides assistance in career and vocational guidance; the emphasis of PCDP is in this area, making it more useful for these purposes.

**ADDITIONAL INFORMATION**

Bloxom, Bruce. "A Test Review of the Sixteen Personality Factor Questionnaire Form A." In *The Eighth Mental Measurements Yearbook*, edited by O.K. Buros, entry 679. Highland Park, NJ: Gryphon Press, 1978.

Bolton, Brian. "A Test Review of the Sixteen Personality Factor Questionnaire Form A." In *The Eighth Mental Measurements Yearbook*, edited by O.K. Buros, entry 679. Highland Press, 1978.

Hussong, M.A.; Sherman, J.L.; and Ferris, G.R. *16 PF Research Bibliography: 1971-1976*. Champaign, IL: IPAT, 1977.

IPAT Staff. *Tabular Supplement No. 1 to the 16 PF Handbook*. Champaign, IL: IPAT, 1970.

Karson, Samuel, and O'Dell, Jerry W. *A Guide to the Clinical Use of the 16 PF*. Champaign, IL: IPAT, 1976.

Walsh, James. "A Test Review of the Sixteen Personality Factor Questionnaire Form A." In *The Eighth Mental Measurements Yearbook*, edited by O.K. Buros, entry 679. Highland Park, NJ: Gryphon Press, 1978.

Walter, Verne. *Personal Career Development Profile*. Champaign, IL: IPAT, 1985.

**NAME** Strong-Campbell Interest Inventory (SCII)

**AUTHORS** Edward K. Strong, Jr., David P. Campbell, and Jo-Ida C. Hansen

**SOURCE**
Consulting Psychologists Press, Inc.
577 College Avenue
Palo Alto, CA 94306

**PURPOSE** SCII measures interests by comparing them to the interests of different people in a variety of occupations. By using these results, individuals can begin to identify long-range goals concerning occupational choices.

**PRIMARY USER POPULATION** Grade eight through adult

**DESCRIPTION OF MATERIALS** SCII is an approximately 30-minute (untimed), 325-item inventory containing 7 parts: Occupations, School Subjects, Activities, Leisure Activities, Types of People, Preference between Two Activities, and Your Characteristics. Most of the items require a response of "like," "indifferent," or "dislike." SCII is organized by General Occupational Themes (GOT) with corresponding Basic Interest Scales and Occupational Scales. GOT utilizes Holland's theory of six occupational personality types: realistic, investigative, artistic, social, enterprising, and conventional. The 23 Basic Interest Scales and 207 Occupational Scales are grouped into 6 categories corresponding to the 6 General Occupational Themes. According to the manual, five types of information are given to the respondent. GOT provides data on overall occupational orientation; the Basic Interest Scales report consistency of interests or aversions in 23 specific areas. The Occupational Scales show degree of similarity between respondents' interests and those of workers in occupations. Scales report introversion and extroversion and degree of comfort in an academic environment. Administrative indexes identify invalid or unusual profiles. Results must be machine scored through the publisher. Overnight scoring services are available. Two types of reports are offered: a profile report and a narrative report. Scores are obtained on both same sex and opposite sex scales. The *User's Guide and Manual* for SVIB-SCII assists in the interpretation of reports. The manual contains a listing of job titles with *Dictionary of Occupational Titles* (DOT) codes and related occupations to encourage further career exploration. A microcomputer-based Microtest service is available from National Computer Systems/Professional Assessment Service, P.O. Box 1416, Minneapolis, Minnesota 55440. Administration, scoring, and interpretation for SCII can be done on site, using an IBM PC or PC/XT and NCS Sentry 3000 tabletop scanner. Consulting Psychologists Press also offers a Strong software package for use with an IBM PC or XT or an Apple IIe or IIc. SCII is available in Spanish, French Canadian, and Hebrew.

**TECHNICAL INFORMATION** Extensive technical data are available in the manual. Norming was done through general reference groups and occupational criterion groups. Test/retest reliability coefficients are presented for 2-week, 30-day, and 3-year periods for each group of scales. The GOT have median reliability coefficients of .91 (2-week), .86 (30-day), and .81 (3-year). The Occupational Scales have coefficients of .92, .89, and .87 for the same time intervals, respectively. The Basic Interest Scales have median coefficients of .91, .88, and .82 (2-week, 30-day, and 3-year intervals). Internal consistency was calculated for GOT and Basic Interest Scales on samples of almost 1,500. Coefficients were .90 for both males and females on the Basic Interest Scales; and .92 and .91 for men and women, respectively, on the GOT. Discussions on validity for each of the three scales are in the manual. Studies have shown the occupational scales to be only moderately effective in predicting occupation and job satisfaction. Concurrent validity has been established for the occupational scales. GOT and Basic Interest Scales were validated internally.

**ADVANTAGES/ DISADVANTAGES** SCII is useful for those individuals who need career guidance. This inventory is most appropriate for college students or adults who are considering a business or professional occupation. Because of this emphasis, SCII would not be as useful to some client groups as other career planning evaluations might be.

**ADDITIONAL INFORMATION**

Bhaerman, Robert D. *Testing in Employment and Training Programs: An Action Planning Guidebook*. Columbus: The National Center for Research in Vocational Education, The Ohio State University, 1981, p. 96.

Crites, John. "A Test Review of the Strong-Campbell Interest Inventory." In *The Eighth Mental Measurements Yearbook*, edited by O.K. Buros, entry 1023. Highland Park, NJ: Gryphon Press, 1978.

Dolliver, Robert. "A Test Review of the Strong-Campbell Interest Inventory." In *The Eighth Mental Measurements Yearbook*, edited by O.K. Buros, entry 1023. Highland Park, NJ: Gryphon Press, 1978.

Hansen, Jo-Ida C., and Campbell, David P. *Manual for the SVIB-SCII*. 4th ed. Palo Alto, CA: Consulting Psychologists Press, 1985.

Johnson, R.W. "A Test Review of the Strong-Campbell Interest Inventory." *Measurement and Evaluation in Guidance* 9, no. 1 (1976): 40-45.

————. "Review of Strong-Campbell Interest Inventory." In *A Counselor's Guide to Vocational Guidance Instruments*, edited by Jerome T. Kapes and Marjorie Moran Mastie, pp. 93-95. Falls Church, VA: American Personnel and Guidance Association, 1982.

Lunneborg, Patricia. "A Test Review of the Strong-Campbell Interest Inventory." In *The Eighth Mental Measurements Yearbook*, edited by O.K. Buros, entry 1023. Highland Park, NJ: Gryphon Press, 1978.

Steinhauer, J. "Reaction to Johnson's Review II." *Measurement and Evaluation in Guidance* 9, no. 1 (1976): 47-48.

Swirsky, Jessica, and Vandergoot, David. *A Handbook of Placement Resources*. Albertson, NY: Human Resources Center, 1980, pp. 59-60.

**NAME** System of Interactive Guidance and Information (SIGI PLUS)

**AUTHOR AND SOURCE**
Educational Testing Service
Princeton NJ 08541

**PURPOSE** SIGI PLUS helps users evaluate their interests, skills, and resources and apply their self-assessed needs, strengths, and weaknesses to career options. It teaches users a process of career planning and decision making.

**PRIMARY USER POPULATION** High school students through adults

**DESCRIPTION OF MATERIALS** SIGI PLUS is a computer-assisted career guidance system containing nine sections: Introduction, Self-Assessment, Search, Information, Skills, Preparing, Coping, Deciding, and Next Steps.

The **Introduction** section has two purposes: to provide information to prepare individuals to use the system and to provide that information in a way that makes people want to continue. It contains the following: a chance for non-first-time users to skip this section and go to another one; brief instructions on how to use ENTER and three function keys; a general discussion of what the system cannot do, aimed at defusing unrealistic expectations; a brief description of each section; a section-by-section buildup of section descriptors and titles, creating a diagram of the system; use of the diagram as a menu; and an option allowing users to ask for more information about any section before they choose where to go next. To get a recommended pathway through the system, users are given a list of statements and asked to choose the one that applies to them (i.e., "I really don't know what I want to do," or "I have an occupation in mind and I want to know more about it"). The pathway identifies sections of the system and suggests a focus for each.

The **Self-Assessment** section has three subsections: Values, Interests, and Activities. In **Values**, users rate values according to a four-point scale ("essential," "very important," "desirable," and "not important"). Each value is briefly defined, although a more detailed definition is available if needed. The occupation-dependent values are as follows: high income, prestige, independence, security, variety, leadership, leisure, and contribution to society. Additional job-dependent values can also be rated, although these are not used later in the **Search** section. These include advancement, challenge, easy commute, flexible hours, pleasant coworkers, on-the-job learning, and staying put.

In **Interests**, users respond to seven interest fields with "yes" or "no." The fields are arts and humanities, business, health, science and math, social and behavioral sciences, sports and physical education, and trades and technologies.

In **Activities**, users choose one of six groups of activities—working with people, working with hands or equipment, communicating, organizing information, working with math, and special skills. They are then asked if they like the activity and if they are good at it. After responding, they receive a summary of their entries and choose the activity considered most important. They can then go to another group of activities or leave this subsection.

The **Search** section allows users to obtain a list of occupations using features they may want including values, interests, activities, and required education; and features they may want to avoid including outdoor work, physically demanding work, sedentary work, public speaking, mathematics, writing, and keen competition for jobs. Each entry narrows the list of occupations. Users are encouraged to narrow the list to 20 occupations before viewing. They can then print the list and start a new one. Lists of occupations are seen with the list of features that produced it. Users can also see why an occupation did not appear on the list.

In the **Information** section, users can find answers to 27 questions about any occupation. These are divided under the following headings: Definition and Description; Education, Training, Other Requirements; Income; Personal Satisfactions; Opportunities and Outlook; and More Information. To find the information, users choose a heading. Up to two occupations can be compared at one time.

In **Skills**, users identify an occupation and seek up to 10 skills needed for that occupation. For each skill, users are asked if they have this skill and are given the option of finding out more about the skill before answering. They are then asked to give an overall rating ("excellent," "good," "fair," or "poor") of their mastery of skills needed for that occupation. An additional management component is also included. The format is similar to the aforementioned description. It also includes an inventory of aspects of work style (i.e., handling stress, providing leadership). The system advises users on management opportunities.

The **Preparing** section overviews typical entry requirements, educational and training programs, and work tasks. Users choose an occupation and see a graphic representation of the pathway to the career goal. They are asked how far along they have already come toward that goal and the computer colors in a portion of the pathway to show what has been completed. The remaining uncolored path shows the preparation needed. Users make a tentative self-rating of their chances of completing the preparation and four additional issues (time, money, ability to handle the difficulty of the preparation, and motivation). The computer confirms or challenges the previous self-rating based on the responses to the four issues. Users can see their self-estimates for all the occupations they have looked at in this section.

In **Coping**, 21 questions are divided under the following headings: Time, Money, Arranging Care for Others, Location, Common Worries, and Credit for What I Know. Users choose a heading and answer the questions shown.

General information applicable to any occupation is provided. The computer structures the problem and offers an approach to investigating possible solutions.

In **Deciding**, users compare three occupations they have investigated and decide which of these is their best choice. Each occupation is rated in terms of potential rewards and risks of not getting the job. Ratings determine where the occupations will show up on a diagram called the deciding square, which permits comparisons to be made. When the occupations are mapped out, users are asked which occupation is the best choice. They have the option of choosing "I can't decide" and receiving assistance. They are then given explanations or suggestions for continuing.

In the final section, **Next Steps**, users identify the goals relevant to them: getting more education or training, developing new skills, proving you can do the work, building a network of contacts, writing a resume, and dealing with obstacles. For each goal chosen, users see a list headed "Questions to Investigate for Each Next Step." Suggestions for answers are provided.

Support materials include a *Counselor's Manual*, a *User's Guide*, an *Installation Manual*, and a *Guide to Further Resources*. The *Counselor's Manual* provides information on interpreting printouts; definitions of SIGI PLUS values, interests, activities, and search variables; and introductory information and information on each section.

The *User's Guide* offers introductory information and a printout checklist. The *Installation Manual* contains information on hardware and software and customizing local information. The *Guide to Further Resources* suggests additional avenues to consider in further exploration.

**TECHNICAL INFORMATION**

The SIGI PLUS system can be used with IBM PC, PC/XT, PC/AT and highly compatible microcomputers. It can also be used with TRS-80 models 11, 12, 16, and 16B, and VAX 11/780.

**ADVANTAGES/ DISADVANTAGES**

SIGI PLUS is an excellent computer-assisted career guidance system developed for adult populations. Comprehensive coverage of career-related issues is available through the system.

**ADDITIONAL INFORMATION**

Norris, Lila; Shatkin, Laurence; Schott, Penelope S.; and Bennett, Mary F. *SIGI PLUS: Development and Field Test of the Computer-Based System of Interactive Guidance and Information . . . Plus More*. Princeton, NJ: Educational Testing Service, 1985.

**NAME** Vocational Interest, Experience, and Skill Assessment (VIESA)

**AUTHOR** American College Testing Program (ACT)

**SOURCE**
The Riverside Publishing Company
8420 Bryn Mawr Avenue
Chicago, IL 60631

**PURPOSE** VIESA is designed to widen the individual's range of career options. Its purpose is to expand self-awareness and identify, explore, and evaluate career options. The World of Work map was designed to assist in relating and integrating data about self to the world of work.

**PRIMARY USER POPULATION** Grade eight through adult

**DESCRIPTION OF MATERIALS** The main part of VIESA is the *Career Guidebook* that includes the World of Work map, a tool for recording and translating vocational preference data into 6 occupational clusters and 23 ACT job families. These are compatible with Holland's theory of careers.

The three sections of VIESA are Vocational Interests, Career Experiences, and Skills Assessment. The **Vocational Interests** section contains 60 items that, when completed, result in occupational preference scores. The **Career Experiences** section generates 60 scores translated into high activity areas. **Skills Assessment** contains 16 skill areas from which the "best" area is selected.

When the scales are completed, relationships are drawn from the profile (on the map) to a large number of specific jobs in the job family charts. Specific steps are given to the individual to continue career exploration. The *User's Handbook* for counselors and teachers provides transparency masters, discussion guides, and other aids. VIESA is a hand-scored, paper-and-pencil assessment that requires less than 1 hour to complete.

**TECHNICAL INFORMATION** Normative groups for VIESA scores are based on a nationally representative sample of 8th, 9th, and 11th graders. Because VIESA is not an actual interest measure but an exploration tool, normal technical consideration is of limited value. Very little technical data are available for VIESA. Existing data are based on prior ACT tests. However, "the purchaser of the VIESA will get an interest test which is psychometrically sound for such a short form" (see Krauskopf 1978).

**ADVANTAGES/ DISADVANTAGES** The VIESA appears appropriate for unemployed adults. The *User's Manual* assists in linking VIESA results to the *Dictionary of Occupational Titles*. The guidebook provides a listing of career resources related to training and jobs. Both the manual and guidebook offer interpretive data.

**ADDITIONAL INFORMATION**

Association for Measurement and Evaluation in Guidance Committee to Screen Career Guidance Instruments. *AMEG Newsnotes* 16, no. 3 (1981), 6.

Bhaerman, Robert D. *Testing in Employment and Training Programs: An Action Planning Guidebook*. Columbus: The National Center for Research in Vocational Education, The Ohio State University, 1981, pp. 97-98.

Krauskopf, Charles J. "A Test Review of the Vocational Interest, Experience, and Skill Assessment." In *The Eighth Mental Measurements Yearbook*, edited by O.K. Buros, entry 1025. Highland Park, NJ: Gryphon Press, 1978.

Mehrens, William A. "Review of the Vocational Interest, Experience, and Skill Assessment." *Measurement and Evaluation in Guidance* 10, no. 3 (1977): 185-189.

Read, Robert W. "Review of Vocational Interest, Experience and Skill Assessment." In *A Counselor's Guide to Vocational Guidance Instruments*, edited by Jerome T. Kapes and Marjorie Moran Mastie, pp. 97-100. Falls Church, VA: American Personnel and Guidance Association, 1982.

## SURVEY INSTRUMENT SUMMARY

| No. | Instrument | What is Measured? | | | | | | | | | | | | How is the Instrument Administered? |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | | APT | ATT | CD | EXP | INT | OK | PER | SK-AC | SK-CD | SK-OCC | TEM | VAL | |
| 1 | APTICOM | X | | | | X | | | X | | | | | Computer |
| 2 | The ANSER System, Self Administered Student Profile (Form 4) | | | | | X | | X | X | | | | | Paper and pencil |
| 3 | Armed Services Vocational Aptitude Battery (ASVAB-14) | X | | | | | | | | | | | | Paper and pencil |
| 4 | Bennett Mechanical Comprehension Test | | | | | | | | | | X | | | Paper and pencil |
| 5 | Career Assessment Inventory (CAI) | | | | | X | | | | | | | | Paper and pencil |
| 6 | Career Decision Making System (CDM) | | | X | | X | | | | | | | | Paper and pencil, optional audio tape |
| 7 | Career Development Inventory (CDI) | | | X | | | | | | | | | | Paper and pencil |
| 8 | Career Maturity Inventory: Second Edition | | X | X | | | | | | X | | | | Paper and pencil |
| 9 | Career Planning Program (CPP) | | | | X | X | | | | | X | | | Paper and pencil |

KEY:
APT = aptitude
ATT = work attitudes
CD = career development
EXP = experience and background information
INT = interests
OK = occupational knowledge
PER = personality
SK-AC = academic skills
SK-CD = career decision making and job search skills
SK-OCC = occupational and job related skills
TEM = work temperaments
VAL = work values

*Continued*

| No. | Instrument | What is Measured? | | | | | | | | | | | | How is the Instrument Administered? |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | | APT | ATT | CD | EXP | INT | OK | PER | SK-AC | SK-CD | SK-OCC | TEM | VAL | |
| 10 | Career Values Card Sort (CVCS) | | | | | | | | | | | | X | Card sort |
| 11 | Comparative Guidance and Placement Program (GCP) | | | | X | X | | | X | | X | | | Paper and pencil |
| 12 | Computer Aptitude, Literacy and Interest Profile (CALIP) | X | | | | X | | | | | X | | | Paper and pencil |
| 13 | Dailey Vocational Tests | X | | | | | | | | | X | | | Paper and pencil |
| 14 | Differential Aptitude Tests (DAT) | X | | | | | | | | | | | | Paper and pencil |
| 15 | Flanagan Industrial Tests (FIT) | X | | | | | | | | | X | | | Paper and pencil |
| 16 | General Aptitude Test Battery (GATB) | X | | | | | | | | | | | | Paper and pencil and apparatus |
| 17 | General Clerical Test (GCT) | X | | | | | | | | | X | | | Paper and pencil |
| 18 | Gordon Occupational Check List II (GOCL II) | | | | | X | | | | | | | | Paper and pencil |
| 19 | Hall Occupational Orientation Inventory | | | | | | | X | | | | | | Paper and pencil |
| 20 | Hand-Tool Dexterity Test | X | | | | | | | | | X | | | Apparatus |
| 21 | Industrial Reading Test (IRT) | | | | | | | | X | | | | | Paper and pencil |

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*Continued*

| No. | Instrument | What is Measured? | | | | | | | | | | | | How is the Instrument Administered? |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | | APT | ATT | CD | EXP | INT | OK | PER | SK-AC | SK-CD | SK-OCC | TEM | VAL | |
| 22 | Job Analysis and Interest Measurement (JAIM) | | | | | X | | | | X | | | X | Paper and pencil |
| 23 | Knowledge of Occupations Test | | | | | | X | | | | | | | Paper and pencil |
| 24 | Kuder Occupational Interest Survey Form DD (KOIS-DD) | | | | | X | | | | | | | | Paper and pencil |
| 25 | Minnesota Importance Questionnaire (MIQ) | | | | | | | X | | | | | | Paper and pencil |
| 26 | Missouri Occupational Card Sort (MOCS) | | | | | X | | | | | | | | Card sort |
| 27 | Missouri Occupational Preference Inventory (MOPI) | | | | | X | | | | | | | | Card sort |
| 28 | Myers-Briggs Type Indicator (MBTI) | | | | | | | X | | | | | | Paper and pencil |
| 29 | Nonreading Aptitude Test Battery (NATB) | X | | | | | | | | | | | | Paper and pencil and apparatus |
| 30 | Non-Sexist Vocational Card Sort (NSVCS) | | | | | X | | | | | | | X | Card sort |
| 31 | Occupational Interests Card Sort (OICS) | | | | | X | | | | | | | | Card sort |

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*Continued*

| No | Instrument | APT | ATT | CD | EXP | INT | OK | PER | SK-AC | SK-CD | SK-OCC | TEM | VAL | How is the Instrument Administered? |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 32 | Occ-U-Sort (O-U-S) | | | | | X | | | | | | | X | Card sort |
| 33 | Ohio Vocational Interest Survey (OVIS II) | | | | | X | | | | | | | | Paper and pencil |
| 34 | Personal Career Development Profile (PCDP) | | | | | | | X | | | | | | Paper and pencil and computer |
| 35 | Picture Interest Exploration Survey (PIES) | | | | | X | | | | | | | | Paper and pencil |
| 36 | Program for Assessing Youth Employment Skills (PAYES) | | X | | | X | | | | X | | | | Paper and pencil |
| 37 | Self-Description Inventory (SDI) | | | | | | | X | | | | | | Paper and pencil |
| 38 | Self-Directed Search (SDS) | | | | | X | | | | | X | | | Paper and pencil |
| 39 | Strong-Campbell Interest Inventory (SCII) | | | | | X | | | | | | | | Paper and pencil |
| 40 | Survey of Interpersonal Values (SIV) | | | | | | | X | | | | | X | Paper and pencil |
| 41 | Talent Assessment Program (TAP) | X | | | | | | | | | X | | | Apparatus |
| 42 | Temperament and Values Inventory (TVI) | | | | | | | | | | | X | X | Paper and pencil |

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*Continued*

| No. | Instrument | What is Measured? | | | | | | | | | | | | How is the Instrument Administered? |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | | APT | ATT | CD | EXP | INT | OK | PER | SK-AC | SK-CD | SK-OCC | TEM | VAL | |
| 43 | VALPAR Component Work Sample System (VCWS) | X | | | | X | | | | | X | | | Work sample |
| 44 | Vocational Exploration and Insight Kit (VEIK) | | | | | X | | | | X | | | | Paper and pencil, card sort |
| 45 | Vocational Information and Evaluation Work Samples (VIEWS) | X | | | | X | | | | | X | | | Work sample |
| 46 | Vocational Interest, Temperament, and Aptitude System (VITAS) | X | | | | X | | | | | | X | | Work sample |
| 47 | Wide Range Interest-Opinion Test (WRIOT) | | | | | X | | | | | | | X | Paper and pencil |
| 48 | Word and Number Assessment Inventory (WNAI) | X | | | | | | | | | | | | Paper and pencil |
| 49 | Work Values Inventory (WVI) | | | | | | | | | | | | X | Paper and Pencil |
| 50 | World of Work Inventory (WOWI) | X | | | | X | | | | | | X | | Paper and pencil |

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| IDENTIFY A PROCESS FOR INITIATING EMPLOYEES' CAREER PLANNING | Goal<br>After completing this module, career guidance personnel will be able to lead employees through career exploration and decision-making activities and assist them in developing Individualized Career Development and Education Plans. |
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|---|---|
| Competency #1: | Select activities to help employees develop self-awareness of career-related values, interests, and skills. |
| Competency #2: | Select and develop activities to promote occupational exploration. |
| Competency #3: | Establish a plan for helping employees develop decision-making skills. |
| Competency #4: | Present a strategy for developing employees' Employability Development Plans. |

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Planning is the final step of occupational exploration and decision making. It includes analysis of past experiences and formal and informal assessment information, and reflects the relationship of that information to occupational interests and choices. The purpose of the planning phase of this program is to help the counselor guide individuals in translating preferences and goals into action. This module will provide the information and learning activities that will help counselors develop the critical competencies necessary to provide career planning guidance to employees needing assistance.

The standard format used in this and other modules for this program is as follows:

- About This Module: This section presents (1) the goal--a statement of what one should be able to accomplish by completing the module, and (2) an outline of the competencies thought to be most critical to achieving the goal.

- Overview: The overview offers an introduction to the topic and describes the purpose and content of the competency to be addressed.

- Learning Experiences: Each learning experience is designed to help users develop a specific competency. Within this section o;f the module are the following components:

    Objective: This statement describes the skills the trainee must be able to demonstrate at the conclusion of the learning experience.

    Review: This section includes individual exercises the trainees comp[lete to demonstrate understanding of the competency. It also provides opportunities for immediate feedback regarding their understanding and progress.

    Activity: The activity is designed to engage the trainee in performing the tasks for which the competency is required. The suggested activities involve a blend of development, presentation, and "hands-on" participant activities, such as games and role playing.

    Checklist: The checklist is merely an itemized list of materials the trainee should have developed, acquired, and assembled through the learning experience.

- Evaluation: This section of each module contains information and instruments that can be used to measure what workshop participants need prior to training and what they have accomplished as a result of training. Included in this section are a Pre- and Post-Participant Assessment Questionnaire and a Trainer's Assessment Questionnaire.

- References: All major sources that were used to develop the module are listed in this section. Also, major materials resources that relate to the competencies presented in the module are described and characterized.

## Individual Career Planning

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| | |
|---|---|
| COMPETENCY #1: | Select activities to help employees develop self-awareness of career-related values, interests, and skills. |

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The planning phase of employee development must begin with an identification of the individual, heterogeneous needs of the employee. Employees of an organization like to be regarded as unique individuals who have every possibility of making distinctive contributions. Therefore, whenever one is analyzing data about individuals' needs and interests, regard for personal values and aspirations must be continuously maintained. Human beings do change--they grow and develop, and the direction they take is largely dependent on their awareness of what is important to them.

Values. The process of values clarification is an often-used component of exploration. Values clarification assists individuals in identifying priorities, and it encompasses any activity that promotes self-examination. Values serve as guides for behavior and as a basis for planning. Values may be indicated by goals, attitudes, interests, feelings, activities, behavior, and even by problems. Values clarification suggests that because values are not often consciously acquired, the process of thinking about and discussing opinions on a variety of topics and reviewing past experiences and interests can help people clarify what they value in life (Kinnear and Krumboltz 1984). Relating values to work decisions and choices helps employees determine their reasons for wanting to work, the characteristics of occupations that are appealing to them, and their career goals.

Appendix E contains worksheets for the four values clarification activities described below:

1. The Life-Career Rainbow exercise which uses the approach of having individuals identify the role work will play in their lives and then relating all of their other roles to their work roles. This exercise allows persons to develop their own career-life rainbow by comparing their short- and long-range goals in various roles in their lives to determine the degree of role harmony or conflict that may result.

2. The Exploring Work Values activity which includes examples specific to women and displaced homemakers, although, it can be adapted to other populations. It is designed to be used in small groups and to promote group discussion and interaction. It includes a thorough inventory of values with space for additional items not included in the inventory.

3. The I Prefer exercise lists 29 items, each with 3-6 responses. Completion of the 29 items helps people develop an image of their work values. They then complete a section in which they describe a job that reflects those values.

4. The Work Values Checklist and Goals for a Balanced Lifestyle relate 38 work values to 11 relationship values and 17 general life values. The user compares and contrasts the various values to determine trends. This activity can help identify work values as well as promote role harmony for the user.

Interests. Informal activities can help individuals develop an awareness of their interests and they can be initiated at the counselor's desk (even in the middle of an interview) with immediate results that can be used to facilitate further discussion.

The U.S. Employment Service (USES) Interest Inventory (1981) identifies interests in 12 occupational areas. It serves as a means of access to the Guide for Occupational Exploration (1979) and is linked with the Dictionary of Occupational Titles (1977), the Occupational Outlook Handbook (1988-89), and the General Aptitude Test Battery. Users are asked to rate 162 occupations using the descriptors "like," "not sure," and "dislike." The areas with the most items marked "like" are the ones that the user would investigate. This inventory is a controlled item and permission to use it must be obtained from the United States Employment Service, Department of Labor, or the local State Employment Security agency. The following activities/worksheets are included in Appendix F.

1. The Work Interest Inventory is designed to help a person identify the degree of interest in eight categories of occupations. The user responds to 56 items using a 5-point scale. It is self-administered and scored.

2. Identifying Your Interests allows the user to indicate his/her interest in given areas. This activity can be used to access the Guide for Occupational Exploration (1979) or other occupational material classified according to 12 USES interest areas.

3. The Party can be used as either a group or individual activity. The accompanying page, depicting Holland's hexagon, can be used as a graphic to supplement the descriptors in the exercise. Users are to select one or more of the six groups that correspond to Holland's six personality types. The results will enable them to access The Dictionary of Holland's Occupational Codes (Gottfredson 1982) or other occupational material classified using the Holland system.

Skills. Traditional methods of self-assessing work-related skills have centered around an examination of the person's education and work history. However, certain paper and pencil skill assessments offer more systematic procedures for examination and exploration. One of the most thorough exercises for determining transferable work skills is provided by Richard Bolles (1979) in The Quick Job Hunting Map. This exercise comes in an advanced and beginner version. The user selects a job or experience and then indicates which skills in a list of numerous skills he or she used. Appendix G contains the activities described below:

1. The Skills Identification exercise lists 36 skill items in 7 categories. In each category, space is provided for additional skills not mentioned. In addition, there are useful sections on volunteer and paid work experience, education, and other skills.

2. The Missing Link provides a systematic way of linking skills to specific occupations. Twenty-two skills are listed that the user is asked to rate on two scales: How well can I do it? and How often do I do it? A definition is provided for each skill. Part 2 of the exercise lists 4-9 occupations for each of the 22 skills. Part 3 of the exercise cross-references the occupations with each of the skills. This activity provides a good opportunity to identify specific occupationsl that employ certain skills. The user attempting to identify occupational options, however, should be encouraged to consult other sources for additional sugggestions for occupations that may be appropriate.

LEARNING EXPERIENCE

## Self-Awareness: A Values Clarification Endeavor

OBJECTIVE: List one value, one interest, and one skill identification activity to use in helping employees develop career-related self awareness.

REVIEW: Read the activities/worksheets in Appendices E, F, and G and consider the appropriateness of each activity for the employees to be served.

ACTIVITY: Prepare a package of activities/worksheets for possible use within in an employee self-assessment activity.

CHECKLIST: Do you have the following:

- o A selected set of career-related self-awareness activities.

REVIEW:

Review the activities/worksheets in Appendices A, B, and C. Discuss with other trainees the value of using such instruments as part of employee career development. Describe any similar activities you have used in counseling and share them with other trainees. Discuss the benefits of the activity worksheets provided in this module and of others that have been introduced. Then, list the names of the activities and the benefits of each in the space below.

| Description of the Approach and Materials You'll Use | Benefits of the Approach (Time, Motivation, etc.) |
|---|---|
| 1. Values | |
| 2. Interests | |
| 3. Skills | |

When you have completed the REVIEW activities, discuss your conclusions with at least one other trainee. Solicit comments on your understanding and application of the concept.

ACTIVITY:

Review the benefits you listed for each identified activity/worksheet. Determine which activity/worksheets or portions of activities/worksheets you would like to use in helping employees develop self-awareness of career-related values, interests, and skills.

Then, assemble into three groups, one each for values, interests, and skills. Each group should share their impressions of the sample employee activities/worksheets as well as others with which group members are familiar. Each group should come back to the total group and recommend at lease one activity that would work well within an employee assistance program.

Next, assemble the activity worksheets you listed above. If desired, combine portions of worksheets from various sources to make up a single, comprehensive inventory worksheet. File the package of activities for future use.

| | | Yes | No |
|---|---|---|---|
| CHECKLIST: | Do you have the following: | | |
| | o A set of selected employee self-awareness activities and worksheets. | ____ | ____ |

---

COMPETENCY #2: Select and/or develop activities to promote occupational exploration.

---

The exploration phase of an employee career development program includes seeking career-related information and exploring career opportunities to learn how various careers relate to employees' skills, interests, and situations. It involves the process of locating sources of information accessing the information, making sense of the information, and using the information to help prioritize potential career options.

Sources of career information that should be made available to employees should include but not be limited to the Dictionary of Occupational Titles (DOT), the Occupational Outlook Handbook (OOH), computer information systems, and interviews with workers in occupations. With the information gleaned from these sources, employees should be lead to identify several jobs to investigate. The following steps should be recommended to employees to help them conduct a thorough investigation of selected jobs.

1. Learn the job qualifications for selected jobs:
    a. Education and training requirements
    b. Job responsibilities
2. Match personal values, interests, education, and skills to the job description.
3. Consider personal needs in relation to the job:
    a. Salary
    b. Employment outlook
    c. Working hours
    d. Opportunities for advancement
    e. Location of most job opportunities

Once career information has been obtained, the employee may need some assistance in evaluating it. The following points should be considered:

o Format is clear and concise.

- Information is current and accurate and/or revisions are available.

- Source is reliable.

- Information is relevant and objective.

- Content and vocabulary are appropriate for the population addressed.

- Information is available regarding specific occupations (nature of work, duties, requirements and occupational clusters grouped by job skills, functions, work setting, and personality types).

Appendix H contains the following structured activity worksheets to help employees gather information they need to explore job options.

1. A Tentative Career Plan is designed to help peoples determine if their proposed career choices are consistent with their goals, values, interests, and so forth. The form provides, however, a systematic means of exploring potential occupations and evaluating them in the process. The form is well organized and thorough.

2. The Occupation Exploration Worksheet is a systematic approach to learning about an occupation. The form helps a person use various sources of information to describe and evaluate an occupation.

Computer-assisted systems offer an alternative approach to paper and pencil inquiry and may be especially useful for career exploration because they have a large capacity for information storage and retrieval and for update and modification. Different systems available emphasize information and/or guidance. Employees can use computer systems to identify career information and the effects of their values and decisions on occupational interests. Once preliminary exploration has begun on a computer, more detailed and current information can be obtained by interviewing people working in occupations (Maze and Cummings 1982).

Harris-Bowlsbey (1984) points out that there is an emphasis in the development of accurate, timely, and often localized occupational information and in the use of the computer in the delivery of this information. There is an absence of didactic material. She summarizes the benefits of the use of computer guidance and information system as follows:

- Increased motivation toward career planning

- Increased vocational maturity
- Increased understanding of the world of work
- Increased conselor time and effectiveness

## LEARNING EXPERIENCE

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OBJECTIVE: For two selected jobs, list the education and training requirements, job responsibilities, salary, employment outlook, working hours, opportunities for advancement, and location of work site and describe how personal values, interests, education, and skills relate to the job.

REVIEW: Review the Tentative Career Plan worksheet and Occupational Exploration worksheet included in Appendix H and determine how they (or others like them) could be used in an employee career development program. Also consider the feasibility and practicability of a computer-assisted career exploration system.

ACTIVITY: Select occupational exploration worksheets or and/or computerized systems to use in an employee career development program.

CHECKLIST: Do you have the following:

- An occupational exploration activity

---

REVIEW:

Review the Tentative Career Plan worksheet and the Occupational Exploration worksheet. Discuss how you would introduce and use such worksheets in an employeer career development program. List any questions or sections to delete, revise, or add. Write a brief rationale for your opinions to present to other trainees in the class.

Next, discuss the potential for using a computer-assisted career exploration system. Learn (1) which companies already have such systems or (2) where employees in the program might gain access to such systems, and (3) what benefits and limitations exist for each system being considered.

When you have completed the REVIEW activities, discuss your conclusions with at least one other trainee. Solicit comments on your understanding and application of the concept.

ACTIVITY:

Prepare a set of worksheets to use in helping employees with career/occupational exploration. Select or alter existing worksheets, or develop new worksheets that are more organization or occupation specific. Also, list any plans for using a computer-assisted occupational exploration system, along with information on how your employees would gain access to such systems.

CHECKLIST:

| | Yes | No |
|---|---|---|
| Do you have the following: | | |
| o Occupational exploration worksheets and/or activities | _____ | _____ |

---

COMPETENCY #3: Establish a plan for helping employees develop decision-making skills.

---

Decision making involves identifying the problem, gathering information, identifying alternatives, evaluating each alternative, and prioritizing and selecting alternatives. Each of the steps in this process are interrelated; at each step of the process an individual must be prepared to review the situation and make new choices based on new information or conditions. Thus, career decision making is not a one-time process. It requires continual reassessment of career status.

Decision making can be a difficult step for some people. Many times, people are unable to recognize all the alternatives available to them. The "gathering information" step is crucial in that it can present options the individual may never have considered.

Probably the most beneficial outcome to learning the decision making process is that it gives the individual a feeling of control over what he or she can do. No matter what the circumstances, people can make decisions that give them control over how they will respond to the circumstances in which they find themselves. For example, employees of an organization may learn that their jobs are being eliminated at the plant where they work. Initially, the employees think they will have to find other jobs. However, after gathering more information, they learns that their jobs are in demand at the company's other plant in another city. Now, instead of thinking there is only one alternative--find another job, the employees learn that they have another one to consider--that of choosing to relocate. Whatever choices they make, the employees are in control (by the process of decision making) of their career progressions.

The following activities are designed to help individuals in the decision-making process. Worksheets for these activities are included in Appendix E.

- The Life Line Exercise promotes the examination of a person's history of decision making over his or her lifetime. It is very useful in gaining insight into the degree of personal control individuals have exercised in making key decisions and for reflecting on the positive and negative consequences of major decisions. Clients will have a better sense of direction and some idea of what major decisions are ahead.

- Decision Making--Step Analysis is not an exercise but a detailed listing of the necessary steps in the decision-making process. This plan can be used as an overview to help structure other activities or provide a framework for the client's approach to career decision-making.

- The Force Field Analysis exercise provides a useful structure of determining how realistic a person's goals are. The analysis of the forces working for or against a goal is very helpful in comparing alternatives. Each occupation being considered as a goal can be subjected to force field analysis so that it can be compared to others.

- Identifying alternatives is a quick exercise to help people structure the process of defining the decision to be made and identifying alternatives. There is space to analyze two decisions on this form. The decisions to be made are written in the boxes labeled decision 1 and 2. Alternatives for each decision are written in the boxes labeled alternatives 1, 2, and 3. Then reasons why the alternatives are a good or poor choice are written in the appropriate boxes under these columns. This exercise is best done in small groups to help users brainstorm alternatives.

- Decisions: Difficulty and Risk Taking and Motivation for Risk Taking attempts to bring together two aspects of decision making: the difficulty associated with making certain kinds of decisions and the amount of risk involved in the decision. Some people are reluctant to make commitments to certain options for fear of negative consequences. This activity will help a person identify when and why they are willing to take risks. The exercise is most effective in small groups where it can be used to promote discussion and increase personal insight.

---

OBJECTIVE: Select or design decision-making activities that will help employees gain skill in gathering information, identifying alternatives, evaluating and prioritizing alternatives, and selecting an alternative to pursue.

REVIEW: Review the worksheets in Appendix I along with any other decision-making activities you may have used in helping individual develop decision making skills.

ACTIVITY: Select, modify, or combine decision-making worksheets and activities to assemble the materials you will use in helping employees in an organization with the decision making process.

CHECKLIST: Do you have the following:

- o A strategy for developing decision-making skills of employees

---

REVIEW:

Review the worksheets in Appendix E. Also review and share with other trainees in this program any other decision-making activities you have successfully used in your career as a counselor.

As a group, discuss and evaluate the alternatives of decision making activities presented by the group. Take notes on the benefits and drawbacks of each alternative.

Personal Notes Regarding Activities in Appendix E.

| Activity | Comments/Reactions/Recommendations |
|---|---|
| 1. Life-line Exercise | |
| 2. Decision Making - Step Analysis | |
| 3. Force Field Analysis | |
| 4. Identify Alternatives | |
| 5. Decision-Difficulty and Risk Taking, and Motivation for Risk Taking | |

When you have completed the REVIEW activities, discuss your conclusions with at least one other trainee. Solicit comments on your understanding and application of the concept.

ACTIVITY:

Form five (5) small groups and assign to each group one of the proposed exercises. The small groups should discuss the method, and modify it or come up with an alternative.

Next, reassemble the groups and have each group share their total discussion and recommendations. The objective of this activity is to have each participant commit to using one or more activities for dealing with decision making with individual and/or groups of employees.

CHECKLIST:

| | Yes | No |
|---|---|---|
| Do you have the following: | | |
| o A set of decision-making skill building activities | ___ | ___ |

---

| | |
|---|---|
| Competency #4 | Present a strategy for developing employees' Employability Development Plans. |

---

A systematic identification of goals, alternatives, assets, and barriers to success is required before career decisions can be made. The more specific a plan is the better it will serve both the employee and the organization. Career and educational plans should never be considered infallible or inflexible. They should be monitored closely and reassessed periodically.

The use of individualized employability development plans is an effective way of guiding employees toward goal achievement. Such plans have the following characteristics:

- They are comprehensive in that they detail the employee's past, present, and future experiences and goals. They provide a written way for employees to identify and consider where they are going and how to get there in terms of life roles and trainming needs.
- They are developmental so they can be used during the employment period with the company and even beyond. Since individuals always are in a state of transition, the plans include elements that are responsive to the demands of any change in the employment life. They are not forms individuals fill out once and follow, but rather plans that are modified as new experiences are acquired or employment requirements identified.
- They are employee centered and employee directed.
- They are competency referenced or based. They include essential information about abilities, interests, values, experiences, achievements, and so forth, and that information is linked with competencies, skills, knowledge, and attitudes required in work or to obtain new training.

The central elements of individualized Employability Development Plans typically include (1) worker roles (including related competencies, interests, and abilities), (2) learner roles (including a record of educational experiences and achievements) (3) individual roles (including information about personal values, health), and (4) family member roles (including responsibilities). Such plans include action steps that enable the employee to analyze, synthesize, and apply the information acquired. It is important to design the plan in a manner that enables employees to think in new ways about the information they record. Possible barriers to the completion of goals should be identified. Friendship and support groups should be noted and role models should be identified.

In helping employees to develop their individual employability developing plans, attention must be given to their career investigation skills and career information management skills. These are the skills needed by employees if they are to begin to find their way through the planning process. Some of this is covered in other modules but a summary follows:

- Career investigation skills involve learning how to gather information. Employees need to know the communities in which they live: the labor market, the mix of occupations and businesses and industries in their communities, the promotion or job transfer practices of their employer, and so forth. To acquire this knowledge, employees in the program must also know how to contact local area schools and agencies and how to talk with personnel who work in these settings. The counselor can provide valuable assistance by giving employees a strategy for establishing people networks to achieve the training goals.

- Career information management skills involve taking information that has been gathered and making sense of it. These skills are crucial in developing an individualized Employability Development Plan. Following are some of the necessary skills counselors can help employees refine or develop.

    1. Sorting, Compiling, and Ranking Information. The Employability Development Plan provides a structure to sort and compile information. Also, within various categories, decisions about information may require individuals to develop values clarification skills as part of their information management.

    2. Evaluating Information Against Appropriate Standards. The skills involved here include knowledge of appropriate standards to be used might include ethical standards of various profesisonal organizations, the employer or labor union.

3. Synthesizing Information. Bringing information together so that is makes sense for career information management. A good plan includes attention to the entire plan, not just parts of the plan.

4. Applying Information. Even though information is well organized and the parts seem to come together into meaninghful groupings, the additional career information management skill of generalizing information is required. This skill involves the ability to take what is learned in one place or situation, see the relationship to another place or situation, and then apply the knowledge to that other place or situation.

The structure of an Employability Develop Plan is that it . .

- provides a written record of decisions made and courses of action to follow.
- provides the individual with a sense of progress, and
- requires the individual to assume responsibility for his or her own behavior.

Appendix F contains the following activities that can be used to assist employees in developing their individual Employability Development Plans.

- Setting Goals for your Career is a practical guide to defining resources on setting and attaining goals. The exercise is thorough and guides the user through a step-by-step process.
- The Goal Setting Process helps identify facilitating factors, barriers, and strategies to overcome the barriers for short-range goals. The use of behavioral objectives is very helpful in keeping the plan concrete and specific. It also enables the user to judge success at each step of the way.
- Goal Setting presents a systematic way of outlining steps to reach a goal. Each step is tied to a completion date, the resources needed to complete each step, and the means by which the resources will be acquired. This exercise is useful for chronological planning.

---

OBJECTIVE: Develop an Employability Development Planning form for employees to use in establishing and documenting their career plans.

REVIEW: Review the forms in Appendix F, discuss the benefits of each section of each form and indicate the elements most important to include in the employees' Employability Development Plans.

ACTIVITY: Prepare a form on which employees can record their Employability Development Plans and describe how you would assist them in completing the planning form.

CHECKLIST: Do you have the following:

- o An Employability Development Plan record form.

---

## REVIEW

Review the three sample forms found in Appendix F. Discuss with other trainees the benefits of various sections of these forms and how that information might be useful for employees of an organization to consider in making their career and educational plans.

Then, using the format below, provide notes on your reactions to the sample forms and indicate what you would want to retain in a final career planning instrument. Add additional examples you may have available from your current work.

| Sample Form | Comments/Revisions/Recommendations |
|---|---|
| Sample #1:<br>Setting Goals for Your Career | |
| Sample #2:<br>The Goal Setting Process | |
| Sample #3:<br>Employability Development Plan | |

When you have completed the REVIEW activities, discuss your conclusions with at least one other trainee. Solicit comments on your understanding and application of the concept.

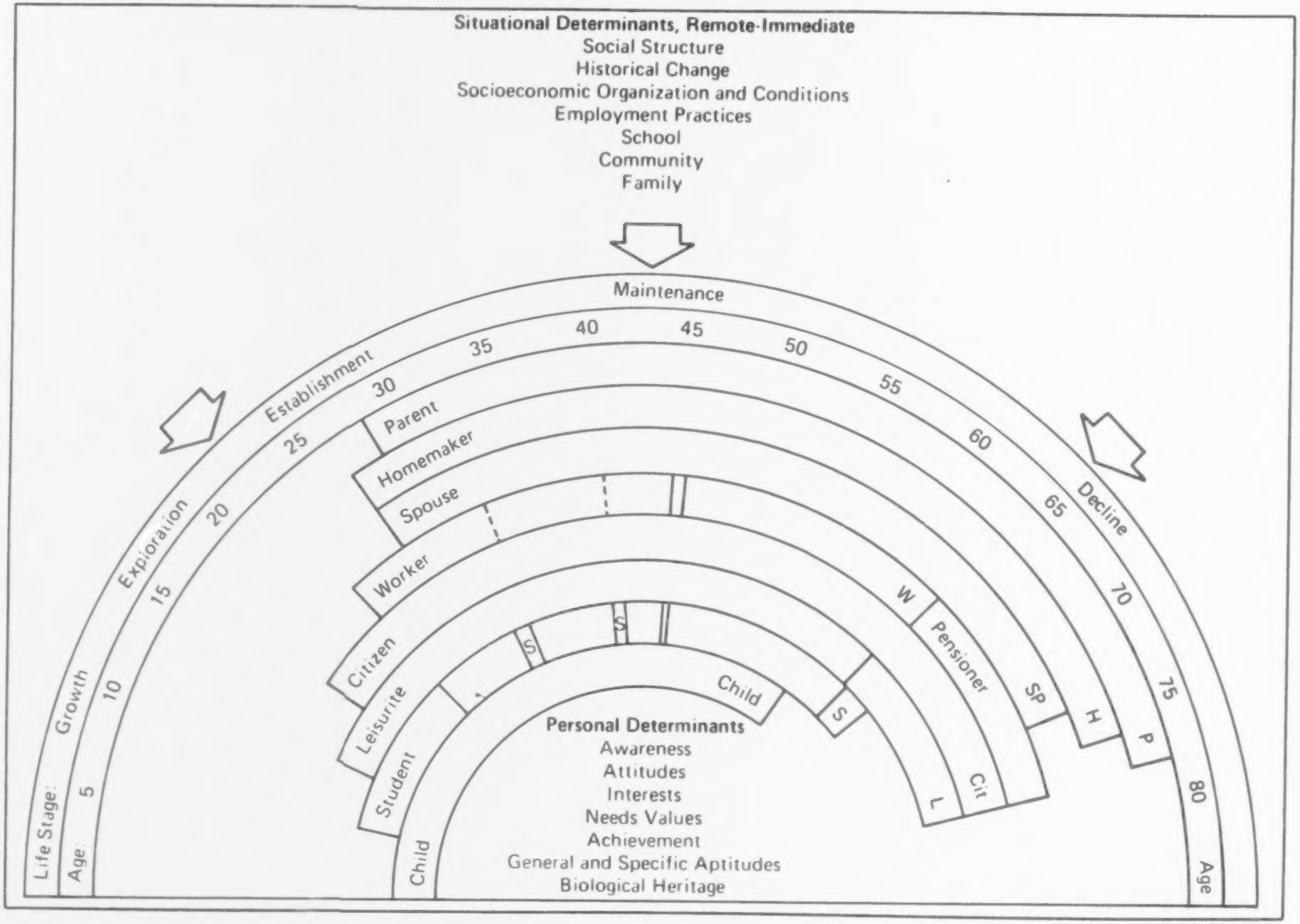
ACTIVITY:

Keeping in mind the elements you checked as wanting to include in a career planning instrument, design the format of the form. To do this, draw the columns, headings, and layout you will follow to prepare a form on which employees can record their career plans. Also, write a brief explanation of how you would help employees locate, gather, and record the information requested on the form.

CHECKLIST: Do you have the following:

- o An Employability Development Plan record form.

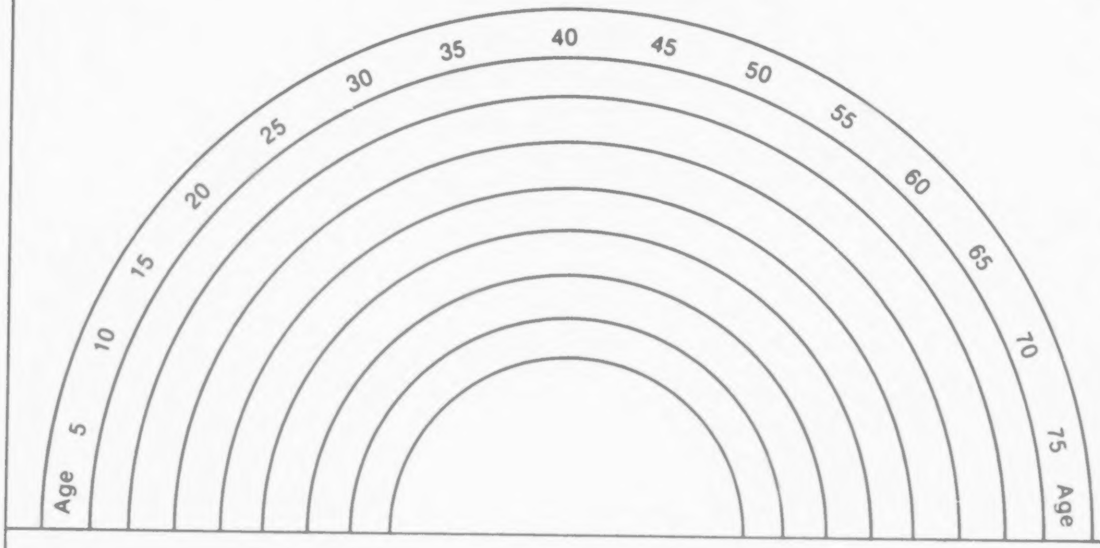
## Example 1: Life-Career Rainbow


**Situational Determinants, Remote-Immediate**
Social Structure
Historical Change
Socioeconomic Organization and Conditions
Employment Practices
School
Community
Family
Maintenance
Life Stage:
Growth
Exploration
Establishment
Decline
Age:
5
10
15
20
25
30
35
40
45
50
55
60
65
70
75
80
Age
Parent
Homemaker
Spouse
Worker
Citizen
Leisurite
Student
Child
W
Pensioner
SP
H
P
S
S
S
Child
Cit
L
**Personal Determinants**
Awareness
Attitudes
Interests
Needs Values
Achievement
General and Specific Aptitudes
Biological Heritage

SOURCE: Super (1980, pp. 282-298)

Example 1—*Continued*

## DONALD SUPER'S LIFE CAREER RAINBOW



ROLE I: WORKER

Short-range Goal:

Long-range Goal:

ROLE II:

Short-range Goal:

Long-range Goal:

ROLE III:

Short-range Goal:

Long-range Goal:

ROLE IV:

Short-range Goal:

Long-range Goal:

ROLE V:

Short-range Goal:

Long-range Goal:

ROLE VI:

Short-range Goal:

Long-range Goal:

ROLE VII:

Short-range Goal:

Long-range Goal:

SOURCE Adapted from Super (1980) by Chikako I. Cox, n.d.

## Example 2: Exploring Work Values

### CHAPTER 1 - EXPLORING WORK VALUES

OBJECTIVE: To learn what work values are and to decide what values are most important to you.

What do people get out of the jobs they do, and what do they look for in a job? Is it really just a question of money? Everyone has different values. Read these four stories and decide what is important to the person in each one.

1. **Susanna**: "I like my job as an electrician because it allows me to use both my hands and my brain. Also, I'm learning a skill I'll have for the rest of my life, and it pays me a lot more than being a secretary. Best of all, I'm my own boss and people respect me. I don't feel helpless any more when it comes to tools or doing things with my hands."

2. **Janelle**: "The good thing about my secretarial job is that I feel like I get things done. I see a letter I've typed in its finished form. Another thing is that I don't take my work home with me; once 5 p.m. rolls around, I don't have to think about my job at all until the next day. My leisure time is my own. I like being good and careful with my work.

   "I don't like the fact that I'm not given enough responsibility or respect. Also, I'm not paid very well, and I resent the fact that I'm never supposed to be late for work, yet my boss can come in or leave when he wants which usually means coming in at 10 and leaving at 4."

SOURCE Hunt and Munro (1982, pp. 89-94)

Example 2—*Continued*

3. **Deborah**: "The best thing about my job as a nurse is that I feel I'm really helping people. I'm needed. Also, I have a skill that is helpful in other parts of my life. It's true that the hours are sometimes bad, but to me that's not as important as the good things."

4. **Valerie**: "I need a job that still lets me spend time with my children who are pretty young. Also, I want a job that prepares me for getting a full-time career when my children are a little older. I want a job that could pay me a lot of money in the future, though maybe not right now. My parents never had enough money and I don't want to have to worry like they did."

**Discussion:**

Form small groups of about six people each to discuss:

1. The worst job I ever had—what was bad about it?
2. The best job I ever had—what was good about it?

For these two questions, don't forget to include being a mother and homemaker. That's a job, too, even if it's usually not a paid job. Also, you can talk about a part of a job. Maybe there were some tasks you hated and others you liked. What were these and why?

Examples of good things about a job might be: you made good money; the job was interesting; the job used your talents; you worked with nice people; the job let you see your children; the job was outside, which you liked; people respected you; you were good at

SOURCE Hunt and Munro (1982, pp 89-94)

Example 2—*Continued*

what you did; nobody bossed you around; you got to work at what you wanted; the job was fairly secure; you felt you achieved something; the job had good benefits; and there was a good chance of advancement on the job.

Examples of bad things about the job might be: you were underpaid; the job was repetitive and boring; you felt you were expendable; you were treated like a machine instead of a person; your boss was racist or sexist; people treated you as if you were stupid; people ordered you around and didn't respect you; the job was dangerous or dirty.

**Task**:

After the whole class has come back together, each person should complete the following:

1. Write down five things that are important to you in any job.

   a. ______________________________

   b. ______________________________

   c. ______________________________

   d. ______________________________

   e. ______________________________

2. Fill in this inventory of values by circling the number that corresponds to how you feel. **There are no right or wrong answers.**

**WHAT IS IMPORTANT TO ME IN A JOB?**

| | Not Important | | Important | | Very Important |
|---|---|---|---|---|---|
| a. Using my mind | 5 | 4 | 3 | 2 | 1 |
| b. Being good at my job, whatever it is | 5 | 4 | 3 | 2 | 1 |
| c. Using my hands | 5 | 4 | 3 | 2 | 1 |
| d. Having a job where I make many decisions on my own | 5 | 4 | 3 | 2 | 1 |

SOURCE: Hunt and Munro (1982, pp. 89-94)

Example 2—*Continued*

| | Not Important | | Important | | Very Important |
|---|---|---|---|---|---|
| e. Having a job that allows me a lot of leisure time | 5 | 4 | 3 | 2 | 1 |
| f. If I'm married, having a job that pays *less* than my husband's job | 5 | 4 | 3 | 2 | 1 |
| g. Having a job that won't move me away from my hometown | 5 | 4 | 3 | 2 | 1 |
| h. Working with people who respect me | 5 | 4 | 3 | 2 | 1 |
| i. Working in a job where I'm an individual, not one face in hundreds | 5 | 4 | 3 | 2 | 1 |
| j. Working in a job where I'm my own boss and I'm responsible only to myself | 5 | 4 | 3 | 2 | 1 |
| k. If I have small children, an outside job that is close to home or that allows me time to see them often | 5 | 4 | 3 | 2 | 1 |
| l. If I'm a homemaker, an outside job that leaves me enough time to do my other work | 5 | 4 | 3 | 2 | 1 |
| m. A job that brings me into contact with a lot of people | 5 | 4 | 3 | 2 | 1 |
| n. A job that's prestigious | 5 | 4 | 3 | 2 | 1 |
| o. A job that pays a lot of money, even if it is otherwise a terrible job (because it goes against everything else I value) | 5 | 4 | 3 | 2 | 1 |
| p. A job that has a lot of possibilities for advancement | 5 | 4 | 3 | 2 | 1 |
| q. A job that uses my special talents | 5 | 4 | 3 | 2 | 1 |
| r. A job that is challenging | 5 | 4 | 3 | 2 | 1 |

SOURCE Hunt and Munro (1982 pp 89-94)

Example 2—*Continued*

| | Not Important | | Important | | Very Important |
|---|---|---|---|---|---|
| s. A job where I feel needed | 5 | 4 | 3 | 2 | 1 |
| t. A job where I feel I'm helping to change the world for the better | 5 | 4 | 3 | 2 | 1 |
| u. A job that has a lot of variety | 5 | 4 | 3 | 2 | 1 |
| v. A job that allows me to be a leader | 5 | 4 | 3 | 2 | 1 |
| w. A job with good benefits: health insurance for me and my family, a retirement fund, sick leave, paid vacations, etc. | 5 | 4 | 3 | 2 | 1 |
| x. A job with a lot of security | 5 | 4 | 3 | 2 | 1 |
| y. A job with the city, state, or federal government | 5 | 4 | 3 | 2 | 1 |
| z. A job in private industry | 5 | 4 | 3 | 2 | 1 |
| aa. A job in a nonprofit organization | 5 | 4 | 3 | 2 | 1 |

In the next few spaces, put down any important values from your previous list that weren't mentioned in the inventory.

| | | | | | |
|---|---|---|---|---|---|
| ______________________________ | 5 | 4 | 3 | 2 | 1 |
| ______________________________ | 5 | 4 | 3 | 2 | 1 |
| ______________________________ | 5 | 4 | 3 | 2 | 1 |
| ______________________________ | 5 | 4 | 3 | 2 | 1 |

3. For the last part of this task, decide which of the values you feel are *most important*. Do this by choosing among the ones you already decided were "very important." If you get stuck, try this: suppose you check as very important "a job that has a lot of possibilities for advancement" and "if I have small children, an outside job that is close to home or which allows me to see them often." Imagine for a moment that you are offered two jobs. In job 1, you would have a good chance for promotion, but you would be able to spend less time with your children. Job 2 *would* let you spend extra time with your

SOURCE Hunt and Munro (1982, pp. 89-94)

Example 2—*Continued*

children, but it is totally dead-end. Which would you choose? Make that number one. Keep going until you have figured out the five things that are most important to you. Write them down in order of importance, most important first. Remember that there are no right or wrong answers; your values are your own.

a. ______________________________________________

b. ______________________________________________

c. ______________________________________________

d. ______________________________________________

e. ______________________________________________

When you explore possible careers, keep asking yourself, "Is this the kind of job I want? Does it fit in with my values?" You won't necessarily find the perfect job that way, but at least you can get closer to a job that satisfies you and meets your needs.

SOURCE Hunt and Munro (1982, pp 89-94)

**Example 3: I Prefer**

## SELF-IMAGE

## VALUES CLARIFICATION

## "I PREFER" EXERCISE AND FOLLOW-UP ABOUT JOB-RELATED VALUES

PART A

Rank your preferences 1 - 2 - 3 for your first, second, and third choices for each group of "I prefer" statements below:

I prefer

____ working alone.
____ working with one other person.
____ working in a group.

Most important to me in a job is

____ the amount of my pay.
____ the service I can render.
____ job status.

The best supervisor

____ is always around.
____ instructs, then leaves.
____ delegates responsibility to me.

I prefer a job which is

____ greasy (or dirty) and hard work with high pay.
____ clean and easy work with low pay.
____ clean and hard work with moderate pay.

I prefer a job which is

____ somewhat dangerous with high pay.
____ safe with low pay.
____ important with low pay.

I prefer a job which is

____ traditional and difficult with medium pay.
____ traditional and easy with low pay.
____ non-traditional (machine operator, etc.) with high pay.

If I had $100 left over after paying bills, I would

____ spend most of it on recreation or other items essential to my happiness.
____ save/invest most of it.
____ spend half, save/invest half.

SOURCE Peltier (1981, pp 90-93)

Example 3—*Continued*

I am most interested in

____ primarily using the skills I acquired while running a home.
____ acquiring new job skills.
____ combining the skills I already have with new ones and using both on the job.

I prefer

____ to be with people most of the time.
____ to be alone most of the time.
____ to divide my time between being with people and being alone.

I think that running a home

____ has enabled me to develop a few skills.
____ has not enabled me to develop any skills.
____ has equipped me with a number of valuable skills.

On a free afternoon, I would prefer

____ attending a meeting about equal job opportunities.
____ being alone to do as I wish.
____ visiting with friends or family.

People who file sex discrimination complaints or lawsuits are

____ working only on their own behalf.
____ doing work which benefits others.
____ troublemakers.

What I value most is

____ money.
____ personal freedom.
____ what others think.
____ knowledge.
____ love.
____ sensitivity.

I should write my representative in the U.S. Congress

____ about how getting a good job is a displaced homemaker's personal problem to be worked out individually.
____ about an issue on which she/he will be voting.
____ about how a displaced homemaker's problem of getting a good job is the social concern of everybody.

SOURCE Peltier (1981, pp. 90-93)

Example 3—*Continued*

| | |
|---|---|
| I should write a letter to the editor | ____ about something happening in the state legislature.<br>____ about the law(s) and the displaced homemaker.<br>____ about some important personal insight which I have acquired and wish to share. |
| I get rid of distress (anger, frustration, hostility) | ____ by suffering in silence or "swallowing" the distress.<br>____ by expressing my anger with words or by taking other action.<br>____ by crying. |
| I would most like to improve | ____ my willingness to value my abilities.<br>____ my job skills.<br>____ my social life. |
| The best place for our elders is | ____ in their own homes.<br>____ with their children.<br>____ in nursing homes.<br>____ in a retirement village. |
| What I would most prefer from a job is | ____ the opportunity to produce results.<br>____ the opportunity for service.<br>____ the pay.<br>____ a sense of accomplishment. |
| What I would value most about my job is | ____ the status.<br>____ the quality of the work involved.<br>____ the pay. |
| I prefer to compete with | ____ a woman.<br>____ a man.<br>____ either one.<br>____ neither one. |
| I would prefer | ____ working for a large business.<br>____ owning my own business.<br>____ working for a small business. |
| I am most concerned about | ____ finances<br>____ old age.<br>____ loneliness. |

SOURCE Peltier (1981, pp 90-93)

Example 3—*Continued*

The person I find most objectionable is

____ a spendthrift.
____ a sloppy housekeeper.
____ a non-stop talker.

I need money primarily for

____ extras.
____ survival purposes.
____ luxuries.

Concerning work on a legal holiday, I would

____ work, if necessary.
____ surely not work.
____ consider working.

I would be least apt to

____ write a letter of protest.
____ help organize a demonstration for publicizing age discrimination in employment.
____ join a sit-in.

I am most concerned about

____ what others think.
____ my personal satisfaction.
____ what my family thinks.

After work, I am primarily interested in

____ social or family activities.
____ being alone.
____ additional work or training to advance myself on the job.

SOURCE Peltier (1981, pp. 90-93)

Example 3—*Continued*

PART B

Next, think about your answers to the "I Prefer" exercise, and then write a paragraph describing the kind of job which would most nearly fit your value system as evidenced by your answers to the "I Prefer" exercise.

In what field or trade would this ideal job for you fit?

Would this job be a 60-, 40-, or 20-hours-per-week job?

- a clean/dirty, traditional/non-traditional, or high-paying/low-paying job?
- an all-consuming responsibility, a way to earn the rent money, or something in between?
- a position which requires exercising authority or being submissive?
- a job which leaves you with lots of free time or one which keeps you busy with overtime assignments or homework?

PART C

When you have completed your paragraph, take turns sharing the content with the two other members of your group.

PART D

Finally, volunteer with an "I learned" statement when the instructor calls for volunteers. We hope you will want to share the exciting new insights which you gained from the "I prefer" activities.

SOURCE Peltier (1981, pp 90-93)

# Appendix B

## Example 1: The Work Interest Inventory

### WORK INTEREST INVENTORY

DIRECTIONS: Read each activity and decide if you would enjoy doing that activity. Then—

- Circle **1** if your answer is **no**.
  Circle **3** if your answer is **I don't think so**.
  Circle **5** if your answer is **I'm not sure**.
  Circle **7** if your answer is **I think so**.
  Circle **10** if your answer is **yes**.
- Write the number that you circle in the box at the end of the row. For example, if you circle **5** for row **a**, then write **5** in the box. $\boxed{5}$ Be sure to do this for every row.

| | No | I don't think so | I'm not sure | I think so | Yes | | |
|---|---|---|---|---|---|---|---|
| 1. Would you enjoy: | | | | | | | |
| a. Typing letters .................. | 1 | 3 | 5 | 7 | 10 | 1a. | ☐ |
| b. Selling things door to door ..... | 1 | 3 | 5 | 7 | 10 | 1b. | ☐ |
| c. Dusting, cleaning, polishing .... | 1 | 3 | 5 | 7 | 10 | 1c. | ☐ |
| d. Moving furniture ............... | 1 | 3 | 5 | 7 | 10 | 1d. | ☐ |
| e. Driving a taxi .................. | 1 | 3 | 5 | 7 | 10 | 1e. | ☐ |
| f. Fixing broken toasters.......... | 1 | 3 | 5 | 7 | 10 | 1f. | ☐ |
| g. Helping nurses in a hospital .... | 1 | 3 | 5 | 7 | 10 | 1g. | ☐ |
| h. Playing in a band .............. | 1 | 3 | 5 | 7 | 10 | 1h. | ☐ |
| 2. Would you enjoy: | | | | | | | |
| a. Adding numbers with a machine....................... | 1 | 3 | 5 | 7 | 10 | 2a. | ☐ |
| b. Selling clothing in a store....... | 1 | 3 | 5 | 7 | 10 | 2b. | ☐ |
| c. Taking care of people's pets .... | 1 | 3 | 5 | 7 | 10 | 2c. | ☐ |

SOURCE: Region 4 Career Guidance Center (n.d.).

Example 1—*Continued*

| | No | I don't think so | I'm not sure | I think so | Yes | | |
|---|---|---|---|---|---|---|---|
| d. Loading and unloading trucks | 1 | 3 | 5 | 7 | 10 | 2d. | ☐ |
| e. Driving a delivery van | 1 | 3 | 5 | 7 | 10 | 2e. | ☐ |
| f. Repairing radios and TV sets | 1 | 3 | 5 | 7 | 10 | 2f. | ☐ |
| g. Helping a teacher | 1 | 3 | 5 | 7 | 10 | 2g. | ☐ |
| h. Designing and painting signs | 1 | 3 | 5 | 7 | 10 | 2h. | ☐ |
| 3. Would you enjoy: | | | | | | | |
| a. Running a copying machine | 1 | 3 | 5 | 7 | 10 | 3a. | ☐ |
| b. Selling cars | 1 | 3 | 5 | 7 | 10 | 3b. | ☐ |
| c. Waiting on tables | 1 | 3 | 5 | 7 | 10 | 3c. | ☐ |
| d. Working on a farm | 1 | 3 | 5 | 7 | 10 | 3d. | ☐ |
| e. Driving a bulldozer | 1 | 3 | 5 | 7 | 10 | 3e. | ☐ |
| f. Fixing cars and trucks | 1 | 3 | 5 | 7 | 10 | 3f. | ☐ |
| g. Working in a child-care center | 1 | 3 | 5 | 7 | 10 | 3g. | ☐ |
| h. Singing or dancing in a show | 1 | 3 | 5 | 7 | 10 | 3h. | ☐ |
| 4. Would you enjoy: | | | | | | | |
| a. Opening and sorting mail | 1 | 3 | 5 | 7 | 10 | 4a. | ☐ |
| b. Selling products to stores | 1 | 3 | 5 | 7 | 10 | 4b. | ☐ |
| c. Waxing floors or shampooing rugs | 1 | 3 | 5 | 7 | 10 | 4c. | ☐ |
| d. Helping to drill for oil | 1 | 3 | 5 | 7 | 10 | 4d. | ☐ |

SOURCE Region 4 Career Guidance Center (n d )

Example 1—*Continued*

| | No | I don't think so | I'm not sure | I think so | Yes | | |
|---|---|---|---|---|---|---|---|
| e. Running a printing press ....... | 1 | 3 | 5 | 7 | 10 | 4e. | ☐ |
| f. Fixing sinks, drains and pipes ... | 1 | 3 | 5 | 7 | 10 | 4f. | ☐ |
| g. Helping poor people ........... | 1 | 3 | 5 | 7 | 10 | 4g. | ☐ |
| h. Drawing pictures for books ..... | 1 | 3 | 5 | 7 | 10 | 4h. | ☐ |
| 5. Would you enjoy: | | | | | | | |
| a. Filing letters and office forms ... | 1 | 3 | 5 | 7 | 10 | 5a. | ☐ |
| b. Selling fruits and vegetables .... | 1 | 3 | 5 | 7 | 10 | 5b. | ☐ |
| c. Preparing food in a restaurant ..................... | 1 | 3 | 5 | 7 | 10 | 5c. | ☐ |
| d. Installing steel beams in buildings .................... | 1 | 3 | 5 | 7 | 10 | 5d. | ☐ |
| e. Running factory machines ...... | 1 | 3 | 5 | 7 | 10 | 5e. | ☐ |
| f. Fixing typewriters .............. | 1 | 3 | 5 | 7 | 10 | 5f. | ☐ |
| g. Helping people find what they need ......................... | 1 | 3 | 5 | 7 | 10 | 5g. | ☐ |
| h. Making rings and bracelets ..... | 1 | 3 | 5 | 7 | 10 | 5h. | ☐ |
| 6. Would you enjoy: | | | | | | | |
| a. Answering telephones .......... | 1 | 3 | 5 | 7 | 10 | 6a. | ☐ |
| b. Selling products over the phone ......................... | 1 | 3 | 5 | 7 | 10 | 6b. | ☐ |
| c. Cutting and styling people's hair ........................... | 1 | 3 | 5 | 7 | 10 | 6c. | ☐ |
| d. Installing carpets .............. | 1 | 3 | 5 | 7 | 10 | 6d. | ☐ |

SOURCE Region 4 Career Guidance Center (n d )

Example 1—*Continued*

| | No | I don't think so | I'm not sure | I think so | Yes | | |
|---|---|---|---|---|---|---|---|
| e. Driving a fork lift ................ | 1 | 3 | 5 | 7 | 10 | 6e. | ☐ |
| f. Fixing broken watches .......... | 1 | 3 | 5 | 7 | 10 | 6f. | ☐ |
| g. Talking with old people......... | 1 | 3 | 5 | 7 | 10 | 6g. | ☐ |
| h. Making pottery ................ | 1 | 3 | 5 | 7 | 10 | 6h. | ☐ |
| 7. Would you enjoy: | | | | | | | |
| a. Greeting visitors ................ | 1 | 3 | 5 | 7 | 10 | 7a. | ☐ |
| b. Modeling clothes for buyers to see............................ | 1 | 3 | 5 | 7 | 10 | 7b. | ☐ |
| c. Carrying people's bags in a hotel .......................... | 1 | 3 | 5 | 7 | 10 | 7c. | ☐ |
| d. Helping bricklayers ............ | 1 | 3 | 5 | 7 | 10 | 7d. | ☐ |
| e. Driving a tow truck ............. | 1 | 3 | 5 | 7 | 10 | 7e. | ☐ |
| f. Tuning and fixing pianos ....... | 1 | 3 | 5 | 7 | 10 | 7f. | ☐ |
| g. Helping people with problems ...................... | 1 | 3 | 5 | 7 | 10 | 7g. | ☐ |
| h. Designing new clothing ........ | 1 | 3 | 5 | 7 | 10 | 7h. | ☐ |

SCORE YOUR WORK INTEREST INVENTORY: You have been busy circling numbers to show how you feel about certain work activities. Now it is time to see what all this means. Here is what to do.

- Look back at the numbers you wrote in the boxes on the inventory. Copy them in the boxes below. Be sure to write each number in the box that has the same number and letter as the box you are copying from.

SOURCE Region 4 Career Guidance Center (n d )

Example 1—*Continued*

- After you have filled all the boxes, add the numbers across. Then write in the total at the end of the row. For example, your first row might look like this:

1 2 3 4 5 6 7

7 + 3 + 5 + 7 + 3 + 10 + 10 = 45

A ☐ + ☐ + ☐ + ☐ + ☐ + ☐ + ☐ = ☐

B ☐ + ☐ + ☐ + ☐ + ☐ + ☐ + ☐ = ☐

C ☐ + ☐ + ☐ + ☐ + ☐ + ☐ + ☐ = ☐

D ☐ + ☐ + ☐ + ☐ + ☐ + ☐ + ☐ = ☐

E ☐ + ☐ + ☐ + ☐ + ☐ + ☐ + ☐ = ☐

F ☐ + ☐ + ☐ + ☐ + ☐ + ☐ + ☐ = ☐

G ☐ + ☐ + ☐ + ☐ + ☐ + ☐ + ☐ = ☐

H ☐ + ☐ + ☐ + ☐ + ☐ + ☐ + ☐ = ☐

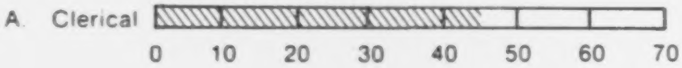
- After you write the total for each row, complete the graph on the next page.

SOURCE Region 4 Career Guidance Center (n.d.)

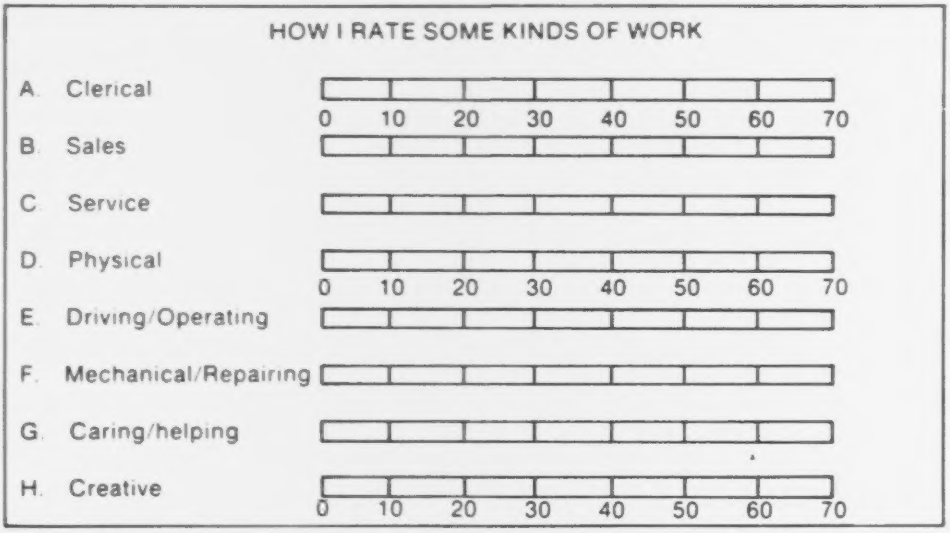
Example 1—*Continued*

GRAPH YOUR WORK INTERESTS: Completion of the graph will show you the kinds of work that seem to interest you most. Here is what to do.

- The bars of the graph are lettered the same as the rows of boxes on the previous page. Find bar A on the graph. Mark bar A so that it shows the total you wrote at the end of row A on the previous page.
- Darken the bar from 0 to the mark you made. For example, if your total for row A were 45, bar A on your graph would be like this.



- Repeat steps 1 and 2 for each bar on the graph.



## READ YOUR GRAPH

After you have darkened all the bars on your graph you can determine some kinds of work that interest you. The inventory checks your interests in only eight kinds of work. There may be other kinds of work in which you may be interested.

Look for your three longest bars on the graph. Then list the kind of work that is printed before each of those bars.

Longest ____________________

Second Longest ____________________

Third Longest ____________________

Of the eight kinds of work listed above, these three seem to interest you most.

SOURCE Region 4 Career Guidance Center (n.d.)

## Exercise 2: Identifying Your Interests

### IDENTIFYING YOUR INTERESTS

Interests are preferences for certain types of activities. Identifying your interests is one of the most important personal characteristics for you to assess in making academic or career choices. Research indicates that you can predict satisfaction with an occupation if it is compatible with your interests.

Interests may be measured in several ways. You may compare your interests with *workers* in occupations or with the *work tasks* involved in the occupations. This exercise compares your interest with the work tasks of various occupations.

The Department of Labor has organized interests into 12 factors or career areas. Check the interest areas below that you would prefer if you were to begin a job tomorrow. Each of these interest areas can be related to a list of occupations through the *Guide for Occupational Exploration* (1979).

**Interest Factors***

| | Like | Dislike |
|---|---|---|
| 1. **Artistic**—interest in creative expression of feelings or ideas | ______ | ______ |
| 2. **Scientific**—interest in discovering, collecting, and analyzing information about the natural world and in applying scientific research findings to problems in medicine, life sciences, and natural sciences | ______ | ______ |
| 3. **Plants and Animals**—interest in activities involving plants and animals, usually in an outdoor setting | ______ | ______ |
| 4. **Protective**—interest in the use of authority to protect people and property | ______ | ______ |
| 5. **Mechanical**—interest in applying mechanical principles to practical situations, using machines, handtools, or techniques | ______ | ______ |
| 6. **Industrial**—interest in repetitive, concrete, organized activities in a factory setting | ______ | ______ |
| 7. **Business detail**—interest in organized, clearly defined activities requiring accuracy and attention to detail, primarily in an office setting | ______ | ______ |

SOURCE Gordon (n.d.)

Exercise 2—*Continued*

| | Like | Dislike |
|---|---|---|
| 8. **Selling**—interest in bringing others to a point of view through personal persuasion, using sales and promotion techniques | | |
| 9. **Accommodating**—interest in catering to the wishes of others, usually on a one-to-one basis | | |
| 10. **Humanitarian**—interest in helping others with their mental, spiritual, social, physical, or vocational needs | | |
| 11. **Leading-influencing**—interest in leading and influencing others through activities involving high-level verbal or numerical abilities | | |
| 12. **Physical performing**—interest in physical activities performed before an audience | | |

Record your three strongest interest areas below:

| Number | Name |
|---|---|
| | |
| | |
| | |

*From the *Guide for Occupational Exploration*, U.S. Department of Labor, 1979

SOURCE: Gordon (n.d.)

## Example 3: The Party

### THE PARTY

DIRECTIONS: Tell the participants to imagine they are at a party where there are six groups of people. The people are grouped according to their interests. The six groups are defined on the next page. The participants can use the diagram on the next page to help them determine in which group they belong.

**Group A:** Realistic. People who have athletic or mechanical ability, prefer to work with objects, machines, tools, plants, animals or to be outdoors.

**Group B:** Conventional. People who like to work with data, have clerical or numerical skill, carry things out in detail, follow through on other's directions.

**Group C:** Enterprising. People who like to work with people in terms of influencing, persuading, leading, managing, performing.

**Group D:** Social. People who like to inform, help, train, or cure other people, or are skilled with words.

**Group E:** Artistic. People who have artistic abilities and who use their imagination or creativity.

**Group F:** Investigative. People who like to observe, learn, investigate, analyze, evaluate, or solve problems.

GROUP ACTIVITY:

1. Ask the participants to select a group. They may actually move to designated areas of the room or remain seated. Make sure all six groups have at least one person.
2. Name several jobs people in each of the six groups might have (leader can repeat certain characteristics to stimulate discussion if need be).
3. Have the participants in each group name additional jobs that people in their group might do.

INDIVIDUAL ACTIVITY

Have a group member tell the group his or her favorite group and why. Then have the same member give his or her second choice. Repeat for all group members. Stress the concepts of interest clusters for jobs.

SOURCE: Region 4 Career Guidance Center (n.d.)

### Example 1: Skills Identification

## TRAINING

## JOB READINESS

## ASSIGNMENT SHEET #1 - SKILLS IDENTIFICATION

DIRECTIONS:

Be as careful as possible in completing these skill identification worksheets. This information can be the basis for your resume. This information will also assist you greatly in completing job application forms. Keep this material with you throughout your job search.

Name ______________________

Address ______________________

Telephone ______________________

Date ______________________

HOMEMAKER-RELATED SKILLS

Job title: ______ Homemaker ______

From ____________ to ____________

From ____________ to ____________

Total number of years as full-time homemaker ____________

Skills: From the following list of homemaking-related job skills, underline each skill you possess. In the space provided, write out what you did to acquire the skill (be specific).

List and explain (how you acquired the skill) additional skills that you have. Your homemaking skills are valuable. Treat them as prized assets, because they are.

**Financial Management**

1. Budgeting (for family, church, organizations, etc.)

SOURCE Peltier (1981, pp 227-235)

Example 1—*Continued*

2. Maintenance of family financial records or financial records for an organization (paying bills, reconciling checkbooks, making investments, etc.)

3. Cost analysis (every time you think about the best buy and list your puchasing choices)

4. Comparative shopping (every time you as a purchasing agent shop for the best buys in groceries, household items, furniture, appliances, insurance, property, investments, etc.)

5. Preparation of state and federal income tax forms

6. Other

**Public Relations**

1. Fund-raising

2. Working in a campaign (political, financial, church, etc.)

3. Writing a newsletter, an article, a press release, etc.

SOURCE Peltier (1981, pp. 227-235)

Example 1—*Continued*

4. Tour guide activities

5. Public speaking

6. Entertaining

7. Negotiating

8. Other

**Administration**

1. Activity supervisor (supervising community or personal projects—a party, a scout troop, a church group, etc.

2. Planner (scheduling time; setting priorities; writing goals, objectives, lists of activities, etc.—for community or personal projects). Example: a week of menu preparation for a large group.

3. Activities coordinator (acting as liaison between persons or groups involved in projects—rummage/garage sales, banquets, school carnivals, etc.; obtaining resources—people, materials—for projects, programs, meetings, etc.)

SOURCE Peltier (1981, pp 227-235)

Example 1—*Continued*

4. Office manager

5. Other

**Technical Skills**

1. Writer (articles, grant applications/proposals, poems, stories)

2. Researcher

3. Teacher (crafts, bird watching, songs, archery, camping skills, etc.)

4. Child care

5. Animal care

6. Nursing

7. Chauffeuring

SOURCE Peltier (1981 pp 227-235)

Example 1—*Continued*

8. Lay counseling (crisis intervention and routine counseling)

9. Typing

10. Bookkeeping (for family business?)

11. Home maintenance, repair, and beautification:
    - Home weatherization (weatherstripping, caulking, etc.)
    - Plumbing (minor/major)
    - Woodworking (repair or construction)
    - Rehabilitation: paneling, interior painting, wallpapering, tile installation (floor or wall), etc.
    - Exterior house painting
    - Interior decorating
    - Flower arranging
    - Landscaping
    - Caring for lawn, flower garden, etc.

SOURCE Peltier (1981 pp 227-235)

Example 1—*Continued*

- Household technician (housekeeping skills)
- Other

**Useful Arts**

1. Chef skills
2. Sewing
3. Other needlework (knitting, crocheting, quilting, etc.)
4. Designing (clothing, furniture, etc.)
5. Arts/crafts
6. Gardening
7. Canning/preserving food

SOURCE Peltier (1981, pp 227-235)

Example 1—*Continued*

8. Other

**Fine Arts**

1. Painting, sketching, drawing, etc.

2. Other

**Additional Homemaking-related Skills**

1. Catering

2. Other

SOURCE Peltier (1981, pp 227-235)

Example 1—*Continued*

VOLUNTEER AND PAID WORK EXPERIENCE (sample entries provided)

| **From - To** | **Job Title** | **Vol.** | **Pd.** | **Company or Organization** | **Very Specific Responsibilities** |
|---|---|---|---|---|---|
| 5/60-4/61 | Treasurer | X | | Avo County Home Extension Club<br>Route 1<br>Avo, Kentucky<br>426/333-2310 | Received and expended $2,500.<br>Reconciled check book.<br>Prepared monthly financial statements. |
| 2/61-5/64 | Weatherizer of homes | | X | Avo County Commissioners<br>Court House<br>Avo, Kentucky<br>426/231-3160 | Operated insulation machine.<br>Caulked cracks.<br>Weatherstripped doors.<br>Installed plastic over windows. |
| | | | | | |
| | | | | | |
| | | | | | |

SOURCE Peltier (1981, pp 227-235)

Example 1—*Continued*

EDUCATION

Include special courses, workshops, seminars. Sample entries are provided for clarification. List your educational experience in chronological order.

| From - To | School or Organization | Educational Emphasis | Work Completed Length of Study | Degree |
|---|---|---|---|---|
| 9/46-5/50 | Avo High School Avo, Kentucky | English | 4 years | H.S. Diploma |
| 9/50-5/52 | Avo State College Avo, Kentucky | Veterinary medicine | 4 semesters | |
| 4/70- | Women's Resource Center Avo, Kentucky | Home repair | 25 hours | |
| 5/79- | Governor's Commission, Status of Women | Women and money | 1 day | |
| | | | | |
| | | | | |
| | | | | |

SOURCE Peltier (1981, pp 227-235).

Example 1—*Continued*

SPECIAL SKILLS, TALENTS, HOBBIES

What have we missed that would strengthen your job qualifications? Do you play a musical instrument; speak/write a foreign or Native American language; have special knowledge/expertise because of some hobby; have special licenses or certifications; operate a machine—film projector, truck, tractor, calculator, typewriter, power hand tools, etc.?

List your special abilities below:

SPECIAL AWARDS/ACHIEVEMENTS

Did you receive a perfect attendance certificate, scholarship or achievement recognition, or an athletic or citizenship award in high school?

List your special awards/achievements below:

MEMBERSHIPS IN ORGANIZATIONS

List organizations for which you hold memberships below:

Now that you realize how capable, experienced, and employable you are, begin selecting the type of job most appropriate for you. Forty hours per week (or more) is a long time to spend being miserable in the wrong kind of job. We hope the next assignments will help you decide how to spend the important years ahead in the happiest, most productive ways.

SOURCE Peltier (1981, pp 227-235)

## Example 2: The Missing Link

### THE MISSING LINK: AN INSTRUMENT FOR MATCHING SKILLS AND ABILITIES WITH EMPLOYMENT

PART I: SKILL ASSESSMENT

Rate yourself on these 22 skills/abilities by circling the numbers that most accurately describe how well, and how often, you do or have done each.

| How Well Can I Do This | How Often Do I Do This |
|---|---|
| 1 = Not at all | 1 = Never |
| 2 = Below average | 2 = Seldom |
| 3 = Average ability | 3 = Occasionally |
| 4 = Above average | 4 = Often |
| 5 = Exceptional | 5 = Regularly |

| Skill/ability | Definition | How Well | How Often |
|---|---|---|---|
| 1. Organizational | Coordinate various things, information, and/or people to accomplish a goal | 1 2 3 4 5 | 1 2 3 4 5 |
| 2. Supervisory | Lead and/or supervise other people, delegate responsibility, mediate | 1 2 3 4 5 | 1 2 3 4 5 |
| 3. Administrative | Establish objectives and priorities, identify resources and needs, make decisions, solve problems | 1 2 3 4 5 | 1 2 3 4 5 |
| 4. Creative | Develop or produce something new, work with ideas, develop concepts | 1 2 3 4 5 | 1 2 3 4 5 |
| 5. Artistic | Creatively work with color and design | 1 2 3 4 5 | 1 2 3 4 5 |
| 6. Musical | Sing, play, or read music | 1 2 3 4 5 | 1 2 3 4 5 |
| 7. Craft | Use my hands to work with crafts (sewing, leather, pottery, knitting, etc.) | 1 2 3 4 5 | 1 2 3 4 5 |

SOURCE Simonsen and Fuson (1979)

Example 2—*Continued*

| Skill/ability | Definition | How Well | How Often |
|---|---|---|---|
| 8. Mechanical | Repair or operate machines, appliances, or tools | 1 2 3 4 5 | 1 2 3 4 5 |
| 9. Physical | Use muscles, strength, and/or coordination | 1 2 3 4 5 | 1 2 3 4 5 |
| 10. Space relations | Visualize or conceputalize the shape and surface of a finished object (three dimensional) from plans or drawings | 1 2 3 4 5 | 1 2 3 4 5 |
| 11. Abstract reasoning | Mentally follow a logical procedure without specific words or numbers as guides; analyze | 1 2 3 4 5 | 1 2 3 4 5 |
| 12. Research | Find information or discover answers in the laboratory or library | 1 2 3 4 5 | 1 2 3 4 5 |
| 13. Mathematical | Understand ideas expressed in numbers; think and reason with numbers | 1 2 3 4 5 | 1 2 3 4 5 |
| 14. Numerical | Work accurately with figures, handle money, attend to details | 1 2 3 4 5 | 1 2 3 4 5 |
| 15. Clerical | Keep records, file, attend to details | 1 2 3 4 5 | 1 2 3 4 5 |
| 16. Language usage | Recognize errors in grammar, punctuation, spelling and syntax; use language correctly | 1 2 3 4 5 | 1 2 3 4 5 |
| 17. Communication (oral) | Understand and articulate ideas expressed in words; promote ideas orally | 1 2 3 4 5 | 1 2 3 4 5 |
| 18. Communication (written) | Communicate information or ideas in writing; organize thoughts or plans on paper | 1 2 3 4 5 | 1 2 3 4 5 |

SOURCE Simonsen and Fuson (1979)

Example 2—*Continued*

| Skill/ability | Definition | How Well | How Often |
|---|---|---|---|
| 19. Persuasive | Demonstrate or sell products, services, or ideas to people | 1 2 3 4 5 | 1 2 3 4 5 |
| 20. Counseling | Help other people solve their problems | 1 2 3 4 5 | 1 2 3 4 5 |
| 21. Interpersonal | Relate well and work well with people, individually or in groups | 1 2 3 4 5 | 1 2 3 4 5 |
| 22. Instructing | Teach a skill or knowledge to other people; facilitate learning situations | 1 2 3 4 5 | 1 2 3 4 5 |

| List your strongest skills (5s or 4s): | List skills used most frequently (5s or 4s): |
|---|---|
| ______________________ | ______________________ |
| ______________________ | ______________________ |
| ______________________ | ______________________ |
| ______________________ | ______________________ |
| ______________________ | ______________________ |
| ______________________ | ______________________ |

SOURCE Simonsen and Fuson (1979)

Example 2—*Continued*

## PART II: MATCHING SKILLS TO SELECTED OCCUPATIONS

Review the skills/abilities you identified in Part I as those you use often and do well. In this section you will use those skills to identify some occupations which require those skills/abilities.

| **Skills** | **Occupations** |
|---|---|
| 1. Organizational | 1. Office manager<br>2. Market researcher<br>3. Bookkeeper<br>4. Secretary<br>5. Coordinator of volunteer services<br>6. Computer tape librarian |
| 2. Supervisory | 1. Program director<br>2. Small business manager<br>3. Production supervisor<br>4. Sales manager |
| 3. Administrative | 1. Small business manager<br>2. Administrative assistant<br>3. Coordinator of volunteer services<br>4. Real estate manager<br>5. Sales manager |
| 4. Creative | 1. Chef<br>2. Caterer<br>3. Artist, graphic<br>4. Advertising copywriter<br>5. Program director<br>6. Buyer, retail<br>7. Seamstress/tailor |
| 5. Artistic | 1. Artist, display<br>2. Floral arranger<br>3. Illustrator<br>4. Decorator service manager<br>5. Artist, graphic<br>6. Photographer |
| 6. Musical | 1. Music teacher<br>2. Music librarian<br>3. Activities coordinator<br>4. Therapy aide<br>5. Piano tuner |

SOURCE: Simonsen and Fuson (1979)

Example 2—*Continued*

| **Skills** | **Occupations** |
|---|---|
| 7. Craft | 1. Oculist |
| | 2. Dental assistant |
| | 3. Artist, graphic |
| | 4. Floral arranger |
| | 5. Seamstress/tailor |
| | 6. Asembly worker |
| | 7. Photographer |
| 8. Mechanical | 1. Word processor |
| | 2. Machine operator |
| | 3. Computer operator |
| | 4. Electronic tester |
| | 5. Typesetter |
| 9. Physical | 1. Activities coordinator |
| | 2. Driver, delivery truck |
| | 3. Driver, bus |
| | 4. House painter |
| | 5. Mail or stock clerk |
| | 6. Artist, display |
| | 7. Instructor, sports |
| 10. Space relations | 1. Decorator |
| | 2. Draftsperson |
| | 3. Dressmaker |
| 11. Abstract reasoning | 1. Underwriter |
| | 2. Expediter |
| | 3. Computer programmer |
| | 4. Security guard |
| 12. Research | 1. Library aide |
| | 2. Paralegal |
| | 3. Laboratory technician |
| | 4. Market researcher |
| 13. Mathematical | 1. Bookkeeper |
| | 2. Draftsperson |
| | 3. Accounting clerk |
| | 4. Computer programmer |
| | 5. Tax consultant |

SOURCE: Simonsen and Fuson (1979).

Example 2—*Continued*

| **Skills** | **Occupations** |
|---|---|
| 14. Numerical | 1. Accounting clerk |
| | 2. Teller |
| | 3. Bookkeeper |
| | 4. Cashier |
| | 5. New accounts representative |
| 15. Clerical | 1. Secretary |
| | 2. File clerk |
| | 3. Mail or stock clerk |
| | 4. Medical transcriptionist |
| | 5. General office clerk |
| | 6. Expeditor |
| 16. Language | 1. Proofreader |
| | 2. Editorial assistant |
| | 3. Secretary |
| 17. Communication (oral) | 1. Public relations assistant |
| | 2. Teacher aide |
| | 3. Salesperson, outside sales |
| | 4. Personnel interviewer |
| | 5. Receptionist |
| | 6. Salesperson, telephone |
| | 7. Telephone operator |
| | 8. Information clerk |
| 18. Communication (written) | 1. Writer |
| | 2. Reporter |
| | 3. Secretary |
| | 4. Copywriter |
| 19. Persuasive | 1. Customer service representative |
| | 2. Salesperson, outside sales |
| | 3. Salesperson, telephone sales |
| | 4. Real estate manager |
| | 5. Employment counselor |
| 20. Counseling skills | 1. Customer service representative |
| | 2. Credit collector |
| | 3. Social service aide |
| | 4. Employment counselor |
| | 5. Police officer |
| | 6. Therapy aide |
| | 7. Patient accounts counselor |

SOURCE Simonsen and Fuson (1979)

Example 2—*Continued*

| Skills | Occupations |
|---|---|
| 21. Interpersonal relations | 1. Therapy aide<br>2. Social services aide<br>3. Patient accounts counselor<br>4. Reservationist<br>5. Salesperson, outside sales<br>6. Salesperson, telephone sales<br>7. Food service worker<br>8. Security guard<br>9. Telephone operator |
| 22. Instructing | 1. Teacher aide<br>2. Activities coordinator<br>3. Instructor, sports<br>4. Account representative |

SOURCE Simonsen and Fuson (1979)

Example 2—*Continued*

## PART III: SELECTED OCCUPATIONS AND SKILLS REQUIRED FOR EMPLOYMENT

In this section you can identify the skills/abilities that are required in selected occupations. Locate occupations of interest to you. Then determine if you have and/or can acquire the skills required by that occupation.

| **Occupation** | **Skills Required** | **Skills May Be Required** |
|---|---|---|
| Accounting Clerk | Numerical<br>Clerical<br>Organizational | |
| Account representative (demonstrate and train for product use) | Interpersonal relations<br>Instructing<br>Communication—oral<br>Organizational<br>Persuasive | Mechanical |
| Activities coordinator (senior or recreation center) | Instructing<br>Interpersonal relations<br>Music or craft<br>Oral communications | |
| Administrative assistant | Organizational<br>Administrative<br>Abstract reasoning<br>Clerical<br>Communications—oral and written | Supervisory<br>Creative<br>Research<br>Mathematical<br>Interpersonal relations |
| Artist, display | Artistic<br>Physical<br>Creative<br>Space relations | Craft<br>Mechanical |
| Artist, graphic (key line, paste-up) | Artistic<br>Space relations<br>Craft | |
| Assembly worker (solderer, binder, etc.) | Craft | Mechanical<br>Physical |
| Bookkeeper | Organizational<br>Mathematical<br>Numerical | Clerical |

SOURCE Simonsen and Fuson (1979)

Example 2—*Continued*

| Occupation | Skills Required | Skills May Be Required |
|---|---|---|
| Buyer, retail | Numerical<br>Organizational<br>Administrative<br>Abstract reasoning | Supervisory<br>Clerical<br>Artistic |
| Cashier | Numerical<br>Clerical<br>Interpersonal relations | |
| Caterer | Organizational<br>Creative<br>Numerical<br>Communications—oral | Persuasive |
| Chef | Creative<br>Supervisory<br>Artistic<br>Organizational | Numerical<br>Instructing |
| Computer programmer | Abstract reasoning<br>Numerical<br>Organizational | |
| Computer operator | Mechanical<br>Abstract reasoning<br>Numerical | |
| Computer tape librarian | Research<br>Clerical<br>Organizational | |
| Coordinator of volunteer services (hospital or non-profit agency) | Organizational<br>Supervisory<br>Administrative<br>Interpersonal relations<br>Instructing<br>Communication—oral<br>Communication—written | Creative |
| Copywriter, advertising | Creative<br>Language usage<br>Communication—written | Clerical |

SOURCE Simonsen and Fuson (1979)

Example 2—*Continued*

| **Occupation** | **Skills Required** | **Skills May Be Required** |
|---|---|---|
| Credit collector | Counseling<br>Clerical<br>Communication—oral<br>Communication—written<br>Persuasive | |
| Customer service representative | Communication—oral<br>Clerical<br>Interpersonal relations<br>Counseling | Persuasive<br>Numerical |
| Decorator | Space relations<br>Artistic<br>Persuasive<br>Physical | Interpersonal relations |
| Decorator service manager | Artistic<br>Organizational<br>Physical<br>Space relations<br>Clerical | Creative<br>Persuasive |
| Dental assistant | Craft<br>Interpersonal relations<br>Clerical | |
| Draftsperson | Mathematical<br>Space relations<br>Abstract reasoning<br>Craft | |
| Dressmaker | Space relations<br>Creative<br>Craft | |
| Driver, bus | Physical<br>Interpersonal relations<br>Communication—oral<br>Numerical | |
| Driver, delivery truck | Physical<br>Organizational<br>Numerical | Clerical |

SOURCE Simonsen and Fuson (1979)

Example 2—*Continued*

| **Occupation** | **Skills Required** | **Skills May Be Required** |
|---|---|---|
| Editorial assistant | Language usage<br>Clerical<br>Communication—written<br>Organizational | Creative |
| Electronic tester | Mechanical<br>Abstract reasoning<br>Numerical | |
| Employment counselor | Counseling<br>Persuasive<br>Administrative<br>Interpersonal relations<br>Communication—oral | Clerical |
| Expeditor | Clerical<br>Organizational<br>Administrative<br>Communication—oral | |
| File clerk | Clerical<br>Organizational | Interpersonal relations |
| Floral arranger | Artistic<br>Creative<br>Space relations<br>Craft | |
| Food service worker | Interpersonal relations<br>Communication—oral<br>Physical<br>Numerical | |
| General office clerk | Organizational<br>Clerical<br>Interpersonal relations | Numerical<br>Communications—oral |
| House painter | Physical<br>Organizational<br>Craft | |
| Illustrator (publishing or advertising) | Artistic<br>Creative | Space relations |

SOURCE Simonsen and Fuson (1979)

Example 2—*Continued*

| Occupation | Skills Required | Skills May Be Required |
|---|---|---|
| Information clerk | Interpersonal relations<br>Communications—oral<br>Abstract reasoning<br>Research | |
| Instructor, sports | Instructing<br>Interpersonal relations<br>Physical<br>Communication—oral<br>Supervisory<br>Organizational | |
| Laboratory technician | Research<br>Physical<br>Organizational | Clerical |
| Library aide | Research<br>Interpersonal relations<br>Clerical<br>Organizational | |
| Machine operator | Mechanical<br>Numerical | Physical<br>Organizational |
| Mail or stock clerk | Clerical<br>Organizational<br>Physical | Interpersonal relations |
| Market researcher | Organizational<br>Research<br>Administrative<br>Clerical | Numerical |
| Medical transcriptionist | Clerical<br>Language usage<br>Organizational | |
| Music librarian | Research<br>Musical<br>Organizational | Clerical |

SOURCE Simonsen and Fuson (1979)

Example 2—*Continued*

| **Occupation** | **Skills Required** | **Skills May Be Required** |
|---|---|---|
| Music teacher (choir, preschool, private lessons) | Musical<br>Interpersonal relations<br>Instructing<br>Communication—oral | |
| New Accounts Representative | Interpersonal relations<br>Clerical<br>Numerical<br>Organizational | |
| Oculist | Craft<br>Clerical<br>Organizational | Interpersonal |
| Office Manager | Organizational<br>Supervisory<br>Administrative<br>Clerical | Interpersonal relations |
| Paralegal | Organizational<br>Research<br>Clerical<br>Communication—oral and written<br>Abstract reasoning | |
| Patient accounts counselor (hospital) | Interpersonal relations<br>Counseling<br>Communications—oral<br>Clerical<br>Numerical<br>Organizational | |
| Personnel interviewer | Interpersonal relations<br>Communication—oral<br>Abstract reasoning<br>Organizational<br>Administrative<br>Persuasive | Clerical |
| Photographer | Mechanical<br>Artistic<br>Space relations | Interpersonal relations |

SOURCE Simonsen and Fuson (1979)

Example 2—*Continued*

| **Occupation** | **Skills Required** | **Skills May Be Required** |
|---|---|---|
| Piano tuner | Musical<br>Mechanical<br>Craft<br>Abstract reasoning | |
| Police officer | Counseling<br>Interpersonal relations | Physical<br>Supervisory<br>Clerical |
| Production supervisor | Supervisory<br>Interpersonal relations<br>Mechanical<br>Instructing | Communication—oral |
| Program director (youth or senior citizen agency) | Supervisory<br>Organizational<br>Administrative<br>Interpersonal relations<br>Communication—oral | Creative<br>Clerical<br>Communication—written |
| Public relations assistant | Communication—oral and written<br>Organizational<br>Clerical<br>Creative<br>Interpersonal relations | Administrative |
| Real estate manager | Organizational<br>Administrative<br>Persuasive<br>Interpersonal relations<br>Numerical<br>Communication—oral | Supervisory<br>Mechanical<br>Clerical<br>Physical |
| Receptionist | Interpersonal relations<br>Communication—oral<br>Clerical | |
| Reporter | Communication—oral and written<br>Interpersonal relations<br>Language usage<br>Organizational<br>Research | Clerical |

SOURCE Simonsen and Fuson (1979)

Example 2—*Continued*

| **Occupation** | **Skills Required** | **Skills May Be Required** |
|---|---|---|
| Sales manager | Organizational<br>Supervisory<br>Administrative<br>Persuasive<br>Interpersonal relations<br>Communication—oral and written | |
| Salesperson—outside sales | Persuasive<br>Numerical<br>Interpersonal relations<br>Communications—oral and written<br>Organizational<br>Administrative | Mathematical<br>Instructing |
| Salesperson—telephone (e.g., reservationist) | Persuasive<br>Communications—oral<br>Interpersonal relations<br>Clerical<br>Numerical | Organizational |
| Seamstress/tailor | Creative<br>Craft<br>Space relations<br>Mechanical | |
| Secretary | Organizational<br>Administrative<br>Clerical<br>Language usage<br>Oral communication<br>Written communication | Numerical<br>Interpersonal relations |
| Security guard | Interpersonal relations<br>Communication—oral<br>Persuasive | Physical |
| Service business manager (housecleaning, decorating, maintenance, clerical, etc.) | Organizational<br>Administrative | Supervisory<br>Persuasive<br>Mechanical<br>Numerical<br>Instructing |

SOURCE Simonsen and Fuson (1979)

Example 2—*Continued*

| Occupation | Skills Required | Skills May Be Required |
|---|---|---|
| Sales manager | Organizational<br>Supervisory<br>Administrative<br>Persuasive<br>Interpersonal relations<br>Communication—oral and written | |
| Salesperson—outside sales | Persuasive<br>Numerical<br>Interpersonal relations<br>Communications—oral and written<br>Organizational<br>Administrative | Mathematical<br>Instructing |
| Salesperson—telephone (e.g., reservationist) | Persuasive<br>Communications—oral<br>Interpersonal relations<br>Clerical<br>Numerical | Organizational |
| Seamstress/tailor | Creative<br>Craft<br>Space relations<br>Mechanical | |
| Secretary | Organizational<br>Administrative<br>Clerical<br>Language usage<br>Oral communication<br>Written communication | Numerical<br>Interpersonal relations |
| Security guard | Interpersonal relations<br>Communication—oral<br>Persuasive | Physical |
| Service business manager (housecleaning, decorating, maintenance, clerical, etc.) | Organizational<br>Administrative | Supervisory<br>Persuasive<br>Mechanical<br>Numerical<br>Instructing |

SOURCE Simonsen and Fuson (1979)

Example 2—*Continued*

| Occupation | Skills Required | Skills May Be Required |
|---|---|---|
| Small business manager | Organizational<br>Supervisory<br>Administrative<br>Mathematical<br>Numerical<br>Interpersonal relations | Creative<br>Mechanical |
| Social service aide (home health aide, intake or outreach worker, nursing) | Counseling<br>Interpersonal relations<br>Communication—oral | Clerical<br>Physical |
| Tax consultant | Mathematical<br>Organizational<br>Interpersonal relations<br>Numerical<br>Clerical | |
| Teacher aide | Interpersonal relations<br>Instructing<br>Communication—oral<br>Counseling | Language usage<br>Mathematical |
| Telephone operator | Communications—oral<br>Interpersonal relations | Organizational |
| Teller | Numerical<br>Clerical<br>Interpersonal relations<br>Communications—oral | |
| Therapy aide | Interpersonal relations<br>Instructing<br>Communication—oral | Musical<br>Craft<br>Physical |
| Typesetter | Mechanical<br>Physical<br>Organizational<br>Language usage | |
| Underwriter | Abstract reasoning<br>Mathematical<br>Interpersonal relations<br>Organizational | |

SOURCE Simonsen and Fuson (1979)

Example 2—*Continued*

| Occupation | Skills Required | Skills May Be Required |
|---|---|---|
| Word processor | Mechanical<br>Clerical<br>Language usage | |
| Writer (medical, technical, educational) | Communications—written<br>Language usage<br>Organizational<br>Creative<br>Research | Administrative<br>Clerical |

SOURCE Simonsen and Fuson (1979)

# Appendix D

## Example 1: A Tentative Career Plan

### A TENTATIVE CAREER PLAN

I. Factors to Consider:

A. Personal goals ______________________________

______________________________

______________________________

B. Desired life-style ______________________________

______________________________

______________________________

C. What are the characteristics associated with your career choice that will help you in achieving the life-style you described above?

1. ______________________________

2. ______________________________

D. Is your career choice consistent with your personal goal? Why?

______________________________

______________________________

______________________________

II. Your Interest and Capabilities:

A. Does your career choice require that you use skills or abilities related to your interests? Explain.

______________________________

______________________________

______________________________

SOURCE Region 4 Career Guidance Center (n.d., pp. 251-255)

Example 1—*Continued*

B. Does your career choice require that you possess specific capabilities? Please list those skills, behaviors, attitudes, or knowledge areas required by your career.

________________________________________

________________________________________

________________________________________

III. Job Characteristics to Consider about Your Tentative Career Choice:

________________________________________
(position desired)

A. What special training or qualifications are required to enter your chosen career field?

1. ______________________________________
2. ______________________________________
3. ______________________________________

B. What are the general duties or the nature of the work associated with your career choice?

________________________________________

________________________________________

________________________________________

C. Where would you go to get the training required to enter your chosen career?

________________________________________

________________________________________

D. What about the training required to enter the career of your choice?

1. How long will it take? ____________________________
2. Are there places where you can get financial assistance? ____________
3. Where can you go for help? __________________________

SOURCE Region 4 Career Guidance Center (n d , pp 251-255)

Example 1—*Continued*

4. Will you need to make a personal investment (office space, equipment, tools) to enter your chosen career choice? ______

5. What will this equipment cost if you purchased it today? ______

______

E. Are there possibilities for advancement in your career area?

1. What position would you advance to if you could? ______

______

2. What training or skills do you need to advance in your area?

______

______

3. How many months or years of experience will you need in your career area in order to advance to the position you desire?

______

F. What is the working environment or conditions associated with your career choice?

1. Indoors ______
2. Hours ______
3. Hazards ______
4. Outdoors ______
5. Shift work ______

G. Are there fringe benefits associated with your career? ______

______

1. Do firms or businesses who hire employees for your career offer these?

a. Health insurance Yes ____ No ____

b. Life insurance Yes ____ No ____

SOURCE Region 4 Career Guidance Center (n.d., pp. 251-255)

Example 1—*Continued*

c. Sick leave Yes ____ No ____

d. Vacation time Yes ____ No ____

2. Are there retirement plans, pension plans, profit sharing plans, stock options, or savings plans associated with those industries who employ workers in your career choice area? ________________________________________

H. What about wages associated with your career choice?

1. Hourly wages Yes ____ No ____

2. Piece or quantity production wages Yes ____ No ____

3. Commissions Yes ____ No ____

4. Salary monthly Yes ____ No ____

5. Yearly salary Yes ____ No ____

6. Will you be docked if you miss work? Yes ____ No ____

IV. Will you be able to get a job in your career area of interest?

A. What is the expected demand for workers employed in your field? Do you need employees who possess the skills you will have?

________________________________________

________________________________________

B. Where (geographic locations) do they employ large numbers of workers in your career area of interest?

________________________________________

1. Are there possibilities in cities?

2. Are there possibilities in small towns?

C. Does one part of our country need more workers with the skills related to your future career than others? If so, where?

________________________________________

SOURCE Region 4 Career Guidance Center (n.d., pp. 251-255)

Example 1—*Continued*

V. Other Jobs that You Could Qualify For with the Same Skills:

A. List at least three other positions you would qualify for if you possessed all of the skills needed and related to your career choice:

1. ____________________

2. ____________________

3. ____________________

B. List two jobs you could do while you wait for openings related to your career area.

1. ____________________

2. ____________________

VI. List where and how you will seek information regarding openings in your career area.

A. ____________________

B ____________________

C ____________________

D ____________________

VII. What can you do now to prepare?

A. Experience you can obtain

1. ____________________

2. ____________________

B. Courses you can take in school

1 ____________________

____________________

3. ____________________

SOURCE Region 4 Career Guidance Center (n.d., pp. 251-255)

Example 1—*Continued*

VIII. List the resources you can use to locate information about your future career choice that you do not currently know:

SOURCE Region 4 Career Guidance Center (n d , pp 251-255)

### Example 2: Occupation Exploration Worksheet

## OCCUPATION EXPLORATION WORKSHEET

The purpose of this activity is to help you learn more about various occupations you might be considering. The worksheet will help you learn about the occupations in detail and provide a framework for comparing one occupation to another. For each occupation you investigate you will need to consult a number of sources of information. Some ideas for sources of information are listed below. A number of characteristics for analyzing each occupation are listed. The worksheet should be completed in the following order:

1. describe each occupational characteristic in as much detail as possible using additional paper if necessary;
2. list your sources of information;
3. evaluate each characteristic for its acceptableness to you. **Acceptable** means that you have that interest, value, or skill, or meet, or plan to meet that particular requirement of the occupation. **Not acceptable** means that you do not have that interest, value, or skill, or will not be able to meet that requirement of the occupation. **Not relevant** means that the characteristic is not relevant to this occupation, to you, or your circumstances.

**Some Sources of Information**

Interviews with workers in the occupation
Interviews with employers who hire people to work in the occupation
Career counselors
Employment agencies, public and private
Books, such as the *Dictionary of Occupational Titles*, the *Occupational Outlook Handbook*, and the *Guide for Occupational Exploration*
Newspapers
Magazines, journals, and trade publications
Placement offices
Yellow pages
Public library
Want ads
Unions and union publications
Interest inventories
Computer guidance systems

Example 2—*Continued*

NAME: ____________________ *OCCUPATION:* ____________________

| CHARACTERISTIC DESCRIPTION | SOURCES OF INFORMATION | ACCEPTABILITY | | |
|---|---|---|---|---|
| | | YES | NO | NOT RELEVANT |
| *1.* **OCCUPATION**<br>Occupation to be investigated ____________________<br>____________________<br>Industries, businesses, institutions, or organizations employing people in this occupation ____________________<br>____________________<br>____________________<br>Geographic areas of the country in which this occupation is commonly found ____________________<br>____________________ | | | | |
| 2. **JOB DUTIES**<br>List 5 or more activities performed in this occupation.<br>a. ____________________<br>____________________<br>b. ____________________<br>____________________ | | | | |

Example 2—*Continued*

NAME: ______________________ *OCCUPATION:* ______________________

| CHARACTERISTIC DESCRIPTION | SOURCES OF INFORMATION | ACCEPTABILITY | | |
|---|---|---|---|---|
| | | YES | NO | NOT RELEVANT |
| c. ______________________<br>______________________ | | | | |
| d. ______________________<br>______________________ | | | | |
| e. ______________________<br>______________________ | | | | |
| f. ______________________<br>______________________ | | | | |
| g. ______________________<br>______________________ | | | | |
| 3. **SKILLS**<br>For each activity listed above, identify the skills required to be proficient in that activity.<br>a. ______________________<br>______________________ | | | | |

Example 2—*Continued*

**NAME:** ______________________ *OCCUPATION:* ______________________

| CHARACTERISTIC | DESCRIPTION | SOURCES OF INFORMATION | ACCEPTABILITY | | |
|---|---|---|---|---|---|
| | | | YES | NO | NOT RELEVANT |
| b. ______________________<br>______________________ | | | | | |
| c. ______________________<br>______________________ | | | | | |
| d. ______________________<br>______________________ | | | | | |
| e. ______________________<br>______________________ | | | | | |
| f. ______________________<br>______________________ | | | | | |
| g. ______________________<br>______________________ | | | | | |

Example 2—*Continued*

NAME: ______________________  *OCCUPATION:* ______________________

| CHARACTERISTIC DESCRIPTION | SOURCES OF INFORMATION | ACCEPTABILITY | | |
|---|---|---|---|---|
| | | YES | NO | NOT RELEVANT |
| 4. **ENTRANCE REQUIREMENTS** | | | | |
| a. Highest degree required (circle one): no degree required, high school, technical or vocational school, 2 year associate degree, 4 year college degree, master's degree, doctoral degree. Describe the type of program required and any other degrees not listed.<br>______________________<br>______________________ | | | | |
| b. If a certain type of training is required, describe the training, how you can get into it, and how it will be financed.<br>______________________<br>______________________ | | | | |
| c. If work experience is required to enter this occupation describe the type and number of years of experience necessary. Can you get this work experience?<br>______________________<br>______________________ | | | | |

Example 2—*Continued*

NAME: ____________________ *OCCUPATION:* ____________________

| CHARACTERISTIC DESCRIPTION | SOURCES OF INFORMATION | ACCEPTABILITY | | |
|---|---|---|---|---|
| | | YES | NO | NOT RELEVANT |
| d. If there is an apprenticeship required, describe the nature of the program, its length, and entrance requirements.<br>______________________<br>______________________ | | | | |
| e. If there is on-the-job training required for this occupation, describe the length of the program, the type of training, and the requirement for being hired.<br>______________________<br>______________________ | | | | |
| f. If there is a certificate or license required for this occupation, describe it and the requirements for acquiring it.<br>______________________<br>______________________ | | | | |
| g. Reading level required.<br>______________________ | | | | |

Example 2—*Continued*

NAME: ______________________ *OCCUPATION:* ______________________

| CHARACTERISTIC DESCRIPTION | SOURCES OF INFORMATION | ACCEPTABILITY | | |
|---|---|---|---|---|
| | | YES | NO | NOT RELEVANT |
| h. Math level required, or specific training in math.<br>______________________ | | | | |
| i. Are there continuing education requirements or ongoing training required to continue or advance in this occupation?<br>______________________<br>______________________ | | | | |
| j. Are there tools or other equipment that needs to be purchased to get started in this occupation? Are there other start-up costs such as uniforms?<br>______________________<br>______________________ | | | | |
| 5. **PHYSICAL ENVIRONMENT**<br>Describe the working conditions. Is this occupation performed inside, outside, or both; in extreme heat, cold, wetness, or humidity; with loud noise or vibration; around hazards; with fumes, odors, toxic conditions, dust, or poor ventilation? | | | | |

Example 2—*Continued*

NAME: ______________________ *OCCUPATION:* ______________________

| CHARACTERISTIC | DESCRIPTION | SOURCES OF INFORMATION | ACCEPTABILITY | | |
|---|---|---|---|---|---|
| | | | YES | NO | NOT RELEVANT |
| ______________________<br>______________________<br>______________________ | | | | | |
| 6. **PHYSICAL DEMANDS**<br>Describe the degree to which the following physical demands are required in this occupation: strength (lifting); standing, sitting, or walking; lifting, carrying, pushing, or pulling; climbing or balancing; stooping, kneeling, crouching, or crawling; reaching, handling, fingering, or feeling; talking, hearing, or seeing.<br>______________________<br>______________________<br>______________________ | | | | | |
| 7. **PAY AND BENEFITS**<br>a. Starting pay ______________________ | | | | | |

Example 2—*Continued*

NAME: ____________________ *OCCUPATION:* ____________________

| CHARACTERISTIC | DESCRIPTION | SOURCES OF INFORMATION | ACCEPTABILITY | | |
|---|---|---|---|---|---|
| | | | YES | NO | NOT RELEVANT |
| b. How paid: salary, hourly, commission, piece rate, other<br>____________________ | | | | | |
| c. Possible pay after several years experience<br>____________________ | | | | | |
| d. How often paid: weekly, every 2 weeks, bimonthly, monthly, other<br>____________________ | | | | | |
| e. Are the following benefits usually available?<br>Health insurance ____________<br>Dental insurance ____________<br>Vision insurance ____________<br>Life insurance ____________<br>Sick time ____________<br>Vacation time ____________<br>Personal time ____________<br>Flex time ____________ | | | | | |

Example 2—*Continued*

NAME: ____________________ *OCCUPATION:* ____________________

| CHARACTERISTIC DESCRIPTION | SOURCES OF INFORMATION | ACCEPTABILITY | | |
|---|---|---|---|---|
| | | YES | NO | NOT RELEVANT |
| Retirement program ____________________<br>Other fringe benefits ____________________<br>f. What are the usual working hours and days for this occupation?<br>____________________<br>____________________ | | | | |
| 8. **EMPLOYMENT OUTLOOK**<br>a. Is this occupation going to be declining, fair, good, or excellent in terms of growth over the next 10 years?<br>____________________<br>____________________<br>b. What are the job opportunities in your area (or in some area to which you intend to move)?<br>____________________<br>____________________ | | | | |

Example 2—*Continued*

NAME: ______________________ *OCCUPATION:* ______________________

| CHARACTERISTIC DESCRIPTION | SOURCES OF INFORMATION | ACCEPTABILITY | | |
|---|---|---|---|---|
| | | YES | NO | NOT RELEVANT |
| c. What are the possibilities for advancement within this occupation or to a related occupation?<br>______________________<br>______________________ | | | | |
| 9. **OCCUPATIONAL VALUES**<br>Describe the extent to which people in this occupation:<br>a. Work on their own or with others ______________<br>______________________<br>b. Help others or have face-to-face contact with others<br>______________________<br>c. Have variety in their job duties ______________<br>______________________<br>d. Exercise leadership, management, or supervisory skills<br>______________________<br>e. Have prestige ______________<br>______________________ | | | | |

Example 2—*Continued*

NAME: ____________________ OCCUPATION: ____________________

| CHARACTERISTIC DESCRIPTION | SOURCES OF INFORMATION | ACCEPTABILITY |  |  |
|---|---|---|---|---|
|  |  | YES | NO | NOT RELEVANT |
| f. Work at a fast or slow pace ____________________ |  |  |  |  |
| g. Work under pressure ____________________ |  |  |  |  |
| h. Take risks or have security ____________________ |  |  |  |  |
| i. Work under close supervision or independently ________ |  |  |  |  |
| j. Work in a small space or are able to move around ______ |  |  |  |  |
| k. Work with ideas, data, things, and/or people: ________ |  |  |  |  |
| 10. **RELATED OCCUPATIONS**<br>Name 3 other occupations closely related to this one regarding skills, job duties, values, or entrance requirements. Are these occupations acceptable alternatives? |  |  |  |  |

Example 2—*Continued*

NAME: ______________________ *OCCUPATION:* ______________________

| CHARACTERISTIC | DESCRIPTION | SOURCES OF INFORMATION | ACCEPTABILITY | | |
| --- | --- | --- | --- | --- | --- |
| | | | YES | NO | NOT RELEVANT |
| a. ______________________ | | | | | |
| b. ______________________ | | | | | |
| c. ______________________ | | | | | |

## 11. EVALUATING THE OCCUPATION

a. In what way is this occupation consistent or not consistent with your values?

______________________________________________

______________________________________________

b. In what way is this occupation consistent or not consistent with your interests?

______________________________________________

______________________________________________

c. In what way is this occupation consistent or not consistent with your skills?

______________________________________________

______________________________________________

Example 2—*Continued*

d. What do you like best about the occupation?

________________________________________

________________________________________

e. What do you like least about the occupation?

________________________________________

________________________________________

f. Review all the characteristics you marked as **unacceptable**. If you are still interested in this occupation you must decide how these characteristics can be made acceptable to you. Can you change your values, interests, or skills to fit the occupation? Can the occupation be changed to better fit you? Or, after consideration, are the unacceptable characteristics so minor that you could live with them?

________________________________________

________________________________________

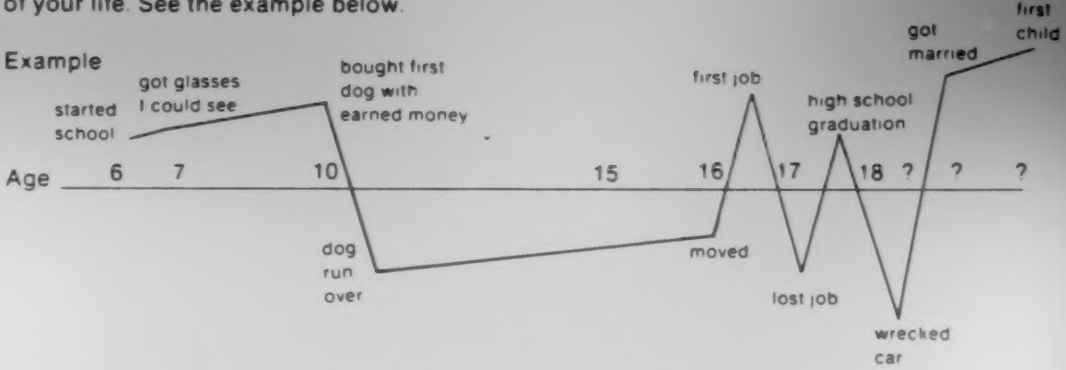
________________________________________

## Example 1: Life Line Exercise

### LIFE LINE EXERCISE

You have made many decisions over your lifetime. Draw a line across the page which symbolizes your life. Draw the line up on the high or rewarding points of your life and down on the low points in your life. At each of these points write the event that stands out at that time. Your life life is unique; no two lines will be the same. Carry the line to the end of your life. See the example below.

Example



**Your life line:**

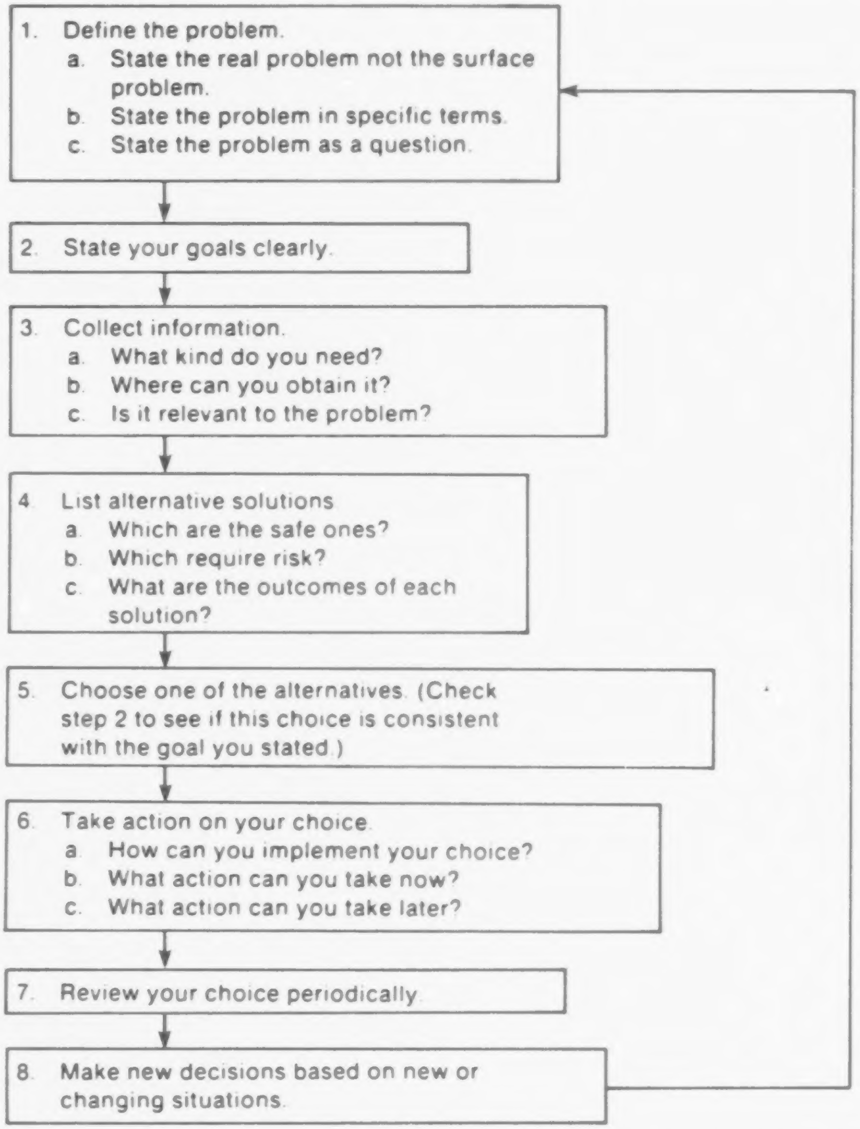
Age ______________________________________________

On your line place the following symbols:

### Example 2: Decision Making—Step Analysis

#### DECISION MAKING—STEP ANALYSIS

The decision making process is used every time you are faced with a situation that offers more than one solution. The steps listed below are a systematic approach to making any decision.



1. Define the problem.
    a. State the real problem not the surface problem.
    b. State the problem in specific terms.
    c. State the problem as a question.
2. State your goals clearly.
3. Collect information.
    a. What kind do you need?
    b. Where can you obtain it?
    c. Is it relevant to the problem?
4. List alternative solutions
    a. Which are the safe ones?
    b. Which require risk?
    c. What are the outcomes of each solution?
5. Choose one of the alternatives. (Check step 2 to see if this choice is consistent with the goal you stated.)
6. Take action on your choice.
    a. How can you implement your choice?
    b. What action can you take now?
    c. What action can you take later?
7. Review your choice periodically.
8. Make new decisions based on new or changing situations.

SOURCE Gordon (n d )

## Example 3: Force Field Analysis

### PARTICIPANT GUIDE
### FORCE FIELD ANALYSIS

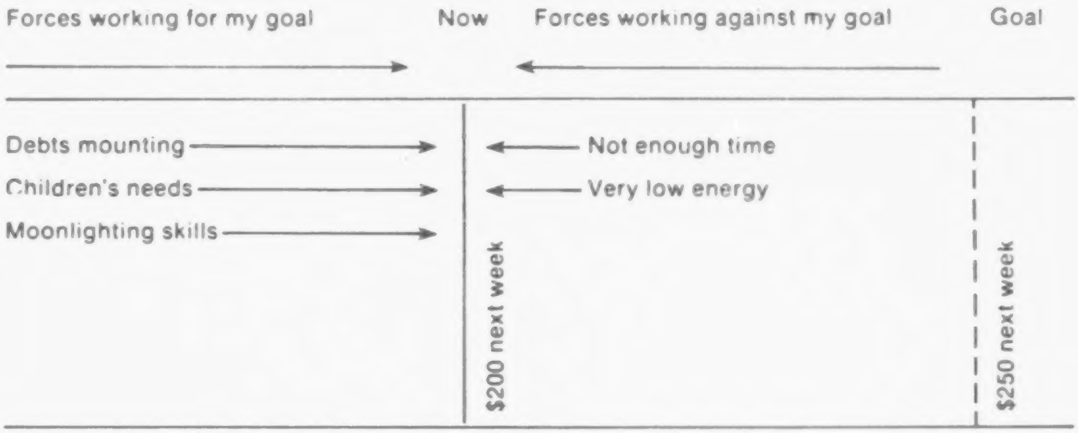
To help you further assess a particular career option, the following *force field analysis* has been included. This process allows you to take a look at the specific forces that are working *for* and *against* something you think you may want.

A problem exists when there is a difference between the way things are and the way someone wants them to be. For example, let's look at the amount of money I will probably earn next week. Let's say it should be about $200. There are factors or forces in my life that might cause me to earn more than that. I have some debts that I'd like to pay off, for example, or my child wants new clothes. I could earn extra money by working as an entertainer or as a consultant on teacher education. On the other hand, there are factors working against my earning more than $200 next week. I'll have little time or energy beyond the 50 hours demanded by my job and the time I promised to spend with my child.

To use the force field technique, start by writing a problem statement at the top of the page. The line down the middle represents the way things are now. The dotted line down the right-hand side of the page represents how you would like things to be. For example, if I wanted to earn $250 next week instead of my usual $200, you would begin to write out the force field diagram as follows:

Problem Statement: I am not earning enough money to live comfortably.

Goal Statement: I want to increase my earnings to $250 per week.


Forces working for my goal
Now
Forces working against my goal
Goal
Debts mounting
Children's needs
Moonlighting skills
Not enough time
Very low energy
$200 next week
$250 next week

SOURCE Adapted from Pino and Emory (1976) by Northwest Regional Educational Laboratory (1984 pp 100-103)

Example 3—*Continued*

### My Force Field Analysis

(Do one for each issue selected.)

Problem Statement:

Goal Statement:

| Forces working for my goal | Now | Forces working against my goal | Goal |
|---|---|---|---|
| | | | |

SOURCE Adapted from Pino and Emory (1976) by Northwest Regional Educational Laboratory (1984. pp 100-103)

Example 3—*Continued*

**My Force Field Analysis**

(Do one for each issue selected.)

Problem Statement:

____________________________________________________

____________________________________________________

Goal Statement:

____________________________________________________

____________________________________________________

____________________________________________________

| Forces working for my goal | Now | Forces working against my goal | Goal |
|---|---|---|---|
| | | | |

SOURCE Adapted from Pino and Emory (1976) by Northwest Regional Educational Laboratory (1984, pp. 100-103)

Example 3—*Continued*

Use this form to analyze the force field you wrote down.

GOAL: ________________________________________

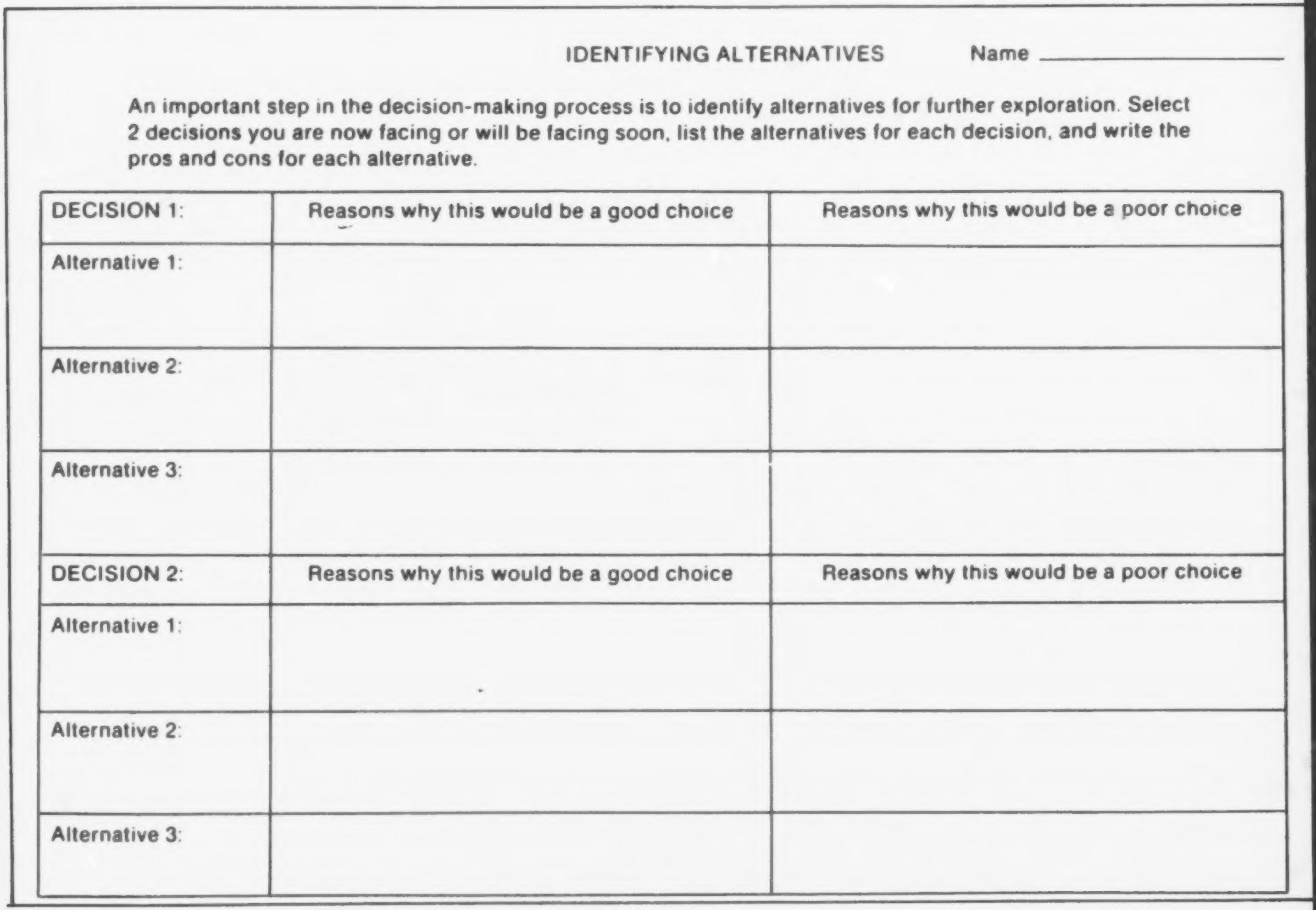
| SECOND: Rank Order of Importance | FIRST: List all forces "for" and "against" | THIRD: Rate Clarity | | |
|---|---|---|---|---|
| | | Clear | Partly Clear | Unclear |
| | | | | |

FOURTH: List those forces that are ranked high in importance, but about which you are unclear.

FIFTH: Explain what you intend to do to explore this item further.

SOURCE Adapted from Pino and Emory (1976) by Northwest Regional Educational laboratory (1984, pp 100-103)

## Example 4: Identifying Alternatives



IDENTIFYING ALTERNATIVES Name ______________________

An important step in the decision-making process is to identify alternatives for further exploration. Select 2 decisions you are now facing or will be facing soon, list the alternatives for each decision, and write the pros and cons for each alternative.

| DECISION 1: | Reasons why this would be a good choice | Reasons why this would be a poor choice |
|---|---|---|
| Alternative 1: | | |
| Alternative 2: | | |
| Alternative 3: | | |
| DECISION 2: | Reasons why this would be a good choice | Reasons why this would be a poor choice |
| Alternative 1: | | |
| Alternative 2: | | |
| Alternative 3: | | |

SOURCE: Gordon (n.d.).

## Example 5: Decisions—Difficulty and Risk Taking and Motivations for Risk Taking

### DECISIONS: DIFFICULTY AND RISK TAKING

Everyone makes decisions daily. Some of the decisions are more important than others. Some are so important that they require thought, study, and investigation before a decision is made, while others are "automatic." Categories for defining decisions according to how they are made may include the following:

0. Not relevant for me
1. Not under my control
2. Automatic or routine
3. Requires occasional thought
4. Requires some thought and is sometimes difficult to make
5. Requires a lot of thought and is never easy to make

Also, some decisions involve more risk than others. Every decision contains some element of risk and the amount of risk we perceive in the options may determine what we decide. Categories of risk in decisions are the following:

0. Not relevant to me
1. No risk is involved in this decision
2. Very minor risk is involved with this decision
   No harm would result from a poor decision
3. Occasional, slight risk is involved in this decision
   Usually, no harm would result from a poor decision
4. Usually some risk is involved with this decision
   Could result in harm to self or others if a poor decision is made
5. This decision involves great risk
   Great harm could result from a poor decision

Following are a number of personal and career decisions. For each decision, first rate the level of difficulty (0-5), and then rate the level of risk (0-5).

SOURCE Adapted from Gordon (n d )

Example 5—*Continued*

| | | **DIFFICULTY** | **RISK** |
|---|---|---|---|
| 1. | To seek help concerning personal problems | ____ | ____ |
| 2. | What to wear | ____ | ____ |
| 3. | What to do with free time | ____ | ____ |
| 4. | How to behave in front of a person who is very important to you | ____ | ____ |
| 5. | To get up in the morning | ____ | ____ |
| 6. | To drive beyond the speed limit | ____ | ____ |
| 7. | To disagree strongly with a friend | ____ | ____ |
| 8. | To not tell the truth | ____ | ____ |
| 9. | How to cope with a serious family problem | ____ | ____ |
| 10. | To change my living arrangements | ____ | ____ |
| 11. | To take a day off from work | ____ | ____ |
| 12. | What career to pursue | ____ | ____ |
| 13. | To wear something unconventional to work | ____ | ____ |
| 14. | To ask for time off from work | ____ | ____ |
| 15. | To challenge a co-worker's ideas | ____ | ____ |
| 16. | To present a new idea for work | ____ | ____ |
| 17. | To sleep in and be late for work | ____ | ____ |
| 18. | To quit your job | ____ | ____ |
| 19. | To ask for a raise | ____ | ____ |
| 20. | To disagree with your boss | ____ | ____ |

SOURCE Adapted from Gordon (n d )

Example 5—*Continued*

## MOTIVATION FOR RISK TAKING

*Taking a risk* is defined as making any decision or taking any action that exposes one to possible loss, injury, failure, or any unpleasant or unknown outcome.

List 10 risks you have taken during your life. (Note both large risks and small risks.)

| RISKS | MOTIVATION |
|---|---|
| 1. ______________________________<br>______________________________ | 1. ______________ |
| 2. ______________________________<br>______________________________ | 2. ______________ |
| 3. ______________________________<br>______________________________ | 3. ______________ |
| 4. ______________________________<br>______________________________ | 4. ______________ |
| 5. ______________________________<br>______________________________ | 5. ______________ |
| 6. ______________________________<br>______________________________ | 6. ______________ |
| 7. ______________________________<br>______________________________ | 7. ______________ |
| 8. ______________________________<br>______________________________ | 8. ______________ |
| 9. ______________________________<br>______________________________ | 9. ______________ |

SOURCE Lindamood (n d )

**10.** ______________________________ **10.** ____________

______________________________

**What motivates people to take risks?**

Following are some possible motivations for risk-taking behavior. Study this list and add more possibilities that you may think of. Then consider the 10 risks you listed. What were your motivations for those risks? Put the number that best describes your motivation for the risk in the blank beside the description of your risk.

**Motivations for risk taking:**

1. At the time I took the risk I did not realize that it was a risk (or at least such a big risk)
2. All other alternatives to taking this risk were very attractive to me.
3. I enjoyed the excitement and unknown of taking the risk.
4. I thought the pay off for taking the risk could be high—I would be happier, healthier, a better person, richer, etc.
5. I had a good support system which made my risk look less threatening.
6. I was motivated to take this risk because others in my position (my age, my social group, my family, etc.) traditionally take such risks.
7. I was strongly encouraged or "pushed" into taking this risk by someone close to me.
8. All of my options were risks at that point in life—I had no choice but to take a risk.
9. I received a secondary gain by taking the risk. The risk itself was not the pay off but something else secondary to the risk was attractive to me.

SOURCE Lindamood (n.d.)

Example 5—*Continued*

**List other motivations you can think of for taking a risk:**

SOURCE Lindamood (n d )

**Example 1: Setting Goals for Your Career**

### CHAPTER 6—SETTING GOALS FOR YOUR CAREER

OBJECTIVE: To learn to develop plans of action and to write short- and long-term career objectives.

**Exercise:** Defining Career Goals

**Step 1: Fill in the following career inventory and the form called The Way to Get There (see example).**

Name of Career ______________________________

What is the minimum level of education required to enter this career at the bottom level?

High school not necessary ________

High school degree or equivalent ____

1 or 2 years of college or other training ______________

4 years of college ______________

What do you have already?

______________________________

______________________________

What do you still need?

______________________________

______________________________

Does the bottom-level position require special courses, training, or licensing?

Yes ____ No ____

How long does this generally take?

______________________________

______________________________

______________________________

What have you done?

______________________________

______________________________

______________________________

What do you still need?

______________________________

______________________________

SOURCE Hunt and Munro (1982, pp. 113-118)

Example 1—*Continued*

What kinds of experience do you need to start this career?

Required: ______________________

______________________

Helpful: ______________________

______________________

______________________

Which do you have?

______________________

______________________

______________________

What do you still need?

______________________

______________________

What kinds of personal characteristics are necessary for this job?

______________________

______________________

______________________

What do you need to work on?

______________________

______________________

______________________

______________________

SOURCE Hunt and Munro (1982 pp 113-118)

Example 1—*Continued*

| THE WAY TO GET THERE | | | |
|---|---|---|---|
| What do I still need? | What is standing in my way? | How can I get over the things in my way? Solutions: | Starting and finishing date |
| | | | |

SOURCE Hunt and Monro (1982, pp 113-118)

Example 1—*Continued*

**THE WAY TO GET THERE**

| What do I still need? | What is standing in my way? | How can I get over the things in my way? Solutions: | Starting and finishing date |
|---|---|---|---|
| B.S. in Forestry Science (4 years of college) | a. I don't have money for tuition. | a. Investigate scholarships and loans. | a. When I get school catalogs, I will research how to get money (by April 1). |
| | b. I might not be able to get into a school. | b. Apply to a lot of different schools. | b. Research schools in *College Blue Book*, look especially at U. of Wash. and U. of Alaska—close by (finish by March 1). |
| | c. There are no forestry courses at the community college in my area. | c. Look into other universities and decide where I would like to go. | c. Write for application and college catalogs (by April 1). |
| | d. I'm not sure I can do it. | d. Read some books on forestry so I will be prepared to talk about it in an intelligent way, look for a correspondence course in forestry, bone up in biology, keep telling myself I *can* do it. | d. Visit some people working in forestry to talk to them about it (by April 15). |
| | e. I don't want to be the only woman in the classes. | e. Look for a school that has quite a few women. | e. When writing for applications, ask how many women are accepted (by April 1). |
| | f. My GED might make it harder to get into a good program. | f. Take a few courses in science at our community college, also try to get another summer job having to do with forestry, talk up 4-H etc., in application. | f. Go see guidance counselor at community college for information (see her by May 1). |
| | g. My SAT and ACT scores might not be good enough (Scholastic Aptitude Test and American College Test, two standardized exams required by many colleges and universities). | g. Find out if I even *need* the SAT or ACT scores for the programs I'm interested in; take some practice tests. | g. Check in catalog about tests needed, buy a book with SAT practice tests and find out when they are given (as soon as catalogs come). |

SOURCE: Hunt and Munro (1982, pp. 113-118)

Example 1—*Continued*

**Step 2: Write a career objective.**

This should be for a job you think you're qualified for now (or for which you could be qualified with only a very small amount of training or self-education). You should try to make it a job that will give you experience toward work in your chosen career.

**Example:**

**Immediate objective:** I am seeking a job as a beginning painter. My goal is to enter an apprenticeship program as a painter and eventually reach journey status. I am dependable and willing to work my way up from the bottom.

________________________________________

________________________________________

________________________________________

**Step 3: Now write a job objective that you might have five years from now.**

**Example:**

**Objective in 5 years:** I am a certified journey-level painter seeking employment in the Seattle area. I am dependable and experienced. I finish jobs quickly, and I come highly recommended by satisfied customers.

________________________________________

________________________________________

________________________________________

Other examples of short- and long-range objectives:

**Short-range objective:** I am seeking a beginning clerk's position in the records department of a hospital or clinic. My long-range goal is to enter a one-year college program to become a certified medical technician. I am a motivated and careful worker with a future.

SOURCE Hunt and Munro (1982, pp 113-118)

Example 1—*Continued*

**Objective in 5 years:** I am a certified medical records technician with three years of graduated employment in an urban hospital. I have recently moved to the Anchorage area, and am now seeking a position in the records department of a medical institution. I am a careful professional who comes with high recommendations.

**Short-range Objective:** I am a seasoned volunteer worker and mother of three school-age children, now seeking a position as a child-care worker. My long-range plans include a degree in Early Childhood Education. I have already taken two courses towards an A.A. degree. I am energetic, friendly, and can supply good references.

**Objective in 5 years:** I have a B.A. degree in Early Childhood Education and am seeking an administrative position in the day-care field. I have four years of experience working in child care and can supply excellent references as to my managerial ability.

**Step 4: Discuss what you have written.**

Now show your objectives to a small group of about six people. Get advice from the group and from workshop leaders on how to make your objectives clearer. If you want, you can make objectives for 3 years from now or 10 years from now. You could have several alternative short- or long-term objectives.

SOURCE Hunt and Munro (1982, pp 113-118)

## Example 2: The Goal Setting Process

### EXERCISE: THE GOAL SETTING PROCESS

**Career Decision-Making Workshop, Session IV**
**Life Planning Workshop**

| SHORT RANGE GOAL | FACILITATING FACTORS | OBSTACLES OR RESTRAINTS | STRATEGY | BEHAVIORAL OBJECTIVES |
|---|---|---|---|---|
| Investigate occupational possibilities | My father has a friend who works in an employment agency. I have time now to spend investigating occupations<br>I am intelligent, get along well with people, willing to learn | I'm not familiar with the world of work<br>I don't really know what I can do well .<br>I can't afford going to college | Talk to people who are knowledgeable about the world of work, read about occupations<br>See a counselor about testing of interests, abilities, etc<br>Analyze what I do with my spare time | This week get appointment with dad's friend, next week visit with counselor<br>Tomorrow make appointment for testing. Make list of things I like.<br>Next week write autiobiography. |

| SHORT-RANGE GOAL | FACILITATING FACTORS | OBSTACLES OR RESTRAINTS | STRATEGY | BEHAVIORAL OBJECTIVES |
|---|---|---|---|---|
| 1. ____________ | 1. ____________ | 1. ____________ | 1. ____________ | 1. ____________ |
| ____________ | ____________ | ____________ | ____________ | ____________ |
| ____________ | ____________ | ____________ | ____________ | ____________ |
| 2. ____________ | 2. ____________ | 2. ____________ | 2. ____________ | 2. ____________ |
| ____________ | ____________ | ____________ | ____________ | ____________ |
| ____________ | ____________ | ____________ | ____________ | ____________ |

SOURCE Counseling and Student Development Center (n d )

**Example 3: Goal Setting**

## GOAL SETTING

This activity is designed to help you determine if your goals are realistic. A good decision implies choices that are realistic as well as satisfying.

A. There are six criteria that can be used to identify a goal that has been well planned.

1. The goal must be your own—you must own it.
2. You must be able to state the goal in your own words.
3. The goal should be legal, ethical, and moral.
4. The goal should have both long-term and short-term components.
5. The short- and long-term components of the goal should be action specific.
6. The short- and long-term components of the goal should be time specific.

B. Now write a career goal you have been considering. First state the goal in general terms and then use the above criteria to make the goal as specific as possible.

1. Goal stated in general terms:

______________________________

______________________________

______________________________

2. Goal stated in specific terms:

______________________________

______________________________

______________________________

Example 3—*Continued*

## GOAL SETTING (continued)

C. Short-term components of the goal:

1. List all the steps necessary to reach the goal.
2. Assign a date for completion of each step.
3. List the resources needed to complete each step.
4. Explain the means you will use to acquire the needed resources.

OCCUPATIONAL GOAL: ______________________________

| A<br>STEP | B<br>DATE | C<br>RESOURCES NEEDED | D<br>MEANS |
|---|---|---|---|
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |
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| | | | |
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## ABOUT THIS MODULE #4

### Employee Referral and Follow-Up

---

Goal

| | |
|---|---|
| DESIGN A PROCESS FOR SYSTEMATICALLY LINKING EMPLOYEES TO SERVICES | After completing this module, career guidance personnel will be able to use a process for effectively linking employees to referral services. |

---

Competency #1: Using a referral process for referring employees to internal and external career guidance services.

Competency #2: Using a career planning sheet with adults planning for career transitions.

Competency #3: Using career referral techniques for adults seeking training, counseling and/or special services.

Competency #4: Using follow-up procedures for assessing the extent of follow-through activities performed by each client.

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It is expected that counselors will develop those skills and attitudes to successfully implement, monitor and assess the effectiveness of referral and follow-up services.

The standard format used in this and other modules for this program is as follows:

- About This Module: This section presents (1) the goal--a statement of what one should be able to accomplish by completing the module, and (2) an outline of the competencies thought to be most critical to achieving the goal.
- Overview: The overview offers an introduction to the topic and describes the purpose and content of the competency to be addressed.
- Learning Experiences: Each learning experience is designed to help users develop a specific competency. Within this section of the module are the following components:

  Objective: This statement describes the skills the trainee must be able to demonstrate at the conclusion of the learning experience.

  Review: This section includes individual exercises the trainees complete to demonstrate understanding of the competency. It also provides opportunities for immediate feedback regarding their understanding and progress.

  Activity: The activity is designed to engage the trainee in performing the tasks for which the competency is required. The suggested activities involve a blend of development, presentation, and "hands-on" participant activities, such as games and role playing.

  Checklist: The checklist is an itemized list of materials the trainee should have developed, acquired, and assembled through the learning experience.
- Evaluation: This section of each module contains information and instruments that can be used to measure what workshop particpants need prior to training and what they have accomplished as a result of training. Included in this section are a Pre- and Post-Participant Assessment Questionnaire and a Trainer's Assessment Questionnaire.
- References. All major sources that were used to develop the module are listed in this section. Also, major materials resources that relate to the competencies presented in the module are described and characterized.

# OVERVIEW

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This module is designed as a resource for counselors who have as a basic purpose the designing and implementation of referral services for adults who must make some type of career transition. It is also oriented to the client's understanding of their opportunities responsibilities, and importance of following up on required services. It can be used as a tool for analyzing the impact and effectiveness of the Employee Assistance Program. A basic assumption of the module suggests the existence of reliable and valid procedures for client referral services and analysis of the use of these services. We need to know if adults develop attitudes and skills to identify new career and training options within a particular firm. Also important is the degree to which they complete their own planned recommendations for improving their employability skills, such as writing, computation or interpersonal skills. As a result of the jointly developed education and training plans, they develop the skills and attitudes for successful career and job decisions is the important question. We need to know if these adult clients use the information and process for career change in a valid and reasonable manner. Career change and preparation for change is time consuming and seldom fits neatly into an adult's already busy life. Nonetheless, the answers to these questions will help the individual counselor, client and employer determine if this guidance, counseling and educational planning program is effective.

## Using Referral Sources: Where Are They and How to Acquire Them

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| | |
|---|---|
| OBJECTIVE: | Identify agencies and services available in the community for program use, and follow-up to determine the effectiveness of their services. |
| REVIEW: | Review Appendix A, B, and D, and materials from your community. |
| ACTIVITY: | Develop a beginning list of potential referral agencies for later use, and a plan for follow-up. |
| CHECKLIST: | You should have the following:<br>o A tentative listing of key agencies (information) and descriptions of services provided. |

---

REVIEW:

The following learning experiences are designed to facilitate client career development and their competence in using referral sources. It is important to evaluate the referral service and its impact on clients. Evaluation questions need to focus on issues such as:

- o Are the skills in using referral sources satisfactory?
- o Is there evidence that referral sources were used?
- o Was the instruction to clients on referral services sufficient?

Answers to these questions are of utmost importance in assessing program quality and sufficiency. Referral services provide clients help in obtaining further education, training, resolving personal/social problems and if used, enhance the corporate training investment. It is vital that career guidance personnel be able to identify, describe and help clients use the following services either in their workplace, in local schools, in community service organizations, etc.

Service Examples

A. Vocational Assessment Centers

B. Career Counseling Services

C. Child Care Centers

D. Employability Skill Development Program

E. Financial Planning Programs

F. Career Information Systems and Services

G. Educational Support Services (transportation, etc.)

H. Job Placement Services

I. Legal Assistance Services

J. Medical and Psychological Services

K. Family and Personal Counseling Services

L. Tuition Support Services

Career guidance personnel are often frustrated by incomplete data and knowledge related to the extent to services available to assist adults. Knowing where to look and who to contact is essential in meeting your client needs (see Appendix A). Likewise, it is as important to know the kinds of agencies that are likely to provide needed services (Appendix B). Appendix D provides some reading material that, in detail, describes the kinds of referral services, internally or externally, that could be available and might need to be recommended. It also provides additional detail regarding what services large communities normally provide and some special ideas for special needs employees.

## ACTIVITY 1 (COMPETENCY 1)

Purpose: To develop a comprehensive list of services to support the career development of adults.

Example: The list below contains a sampling of such services. List several for each category:

1. A financial planning service
2. A career counseling center/service
3. A job placement service
4. A university admissions office
5. A vocational/technical school
6. A training program for adults

Have each participant develop a list of local services: name, address, contact person, cost, etc. (also, see Appendix A). Use the worksheet that follows (Registry of Referral Services) for conducting this exercise.

## ACTIVITY 2 (COMPETENCY 2)

Purpose: To develop skill in using planning techniques with adults.

Review: Discuss (large group or small groups) corporation desire to improve the skills of its current work force in the area of basic skills human relations and study skills. It is important to assist adults who have been terminated and/or earmarked for re-training in developing planning skills. The following checklist may be useful in generating skill specific ideas for client planning.

Also, the following are positive strategies to consider when working with an adult population:

Nontraditional trainees may feel that they face formidable barriers to employment and find that many of the valuable skills that they (especially displaced homemakers) developed outside of the classroom are ignored by employers. Some individuals may be aided by agencies not sufficiently knowledgeable about existing vocational opportunities, feel reluctant to enter into programs dominated by members of the opposite sex, or lack training that traditional students typically have received (Bhaerman, et al., 1986).

Here are some positive strategies to consider when working with any special population individuals:

- o Provide complete career and program information; ensure that all materials are free of racial, cultural, or class biases.
- o Seek positive ways to encourage and motivate.
- o Identify and confront the individual's fears.
- o Help clients or students develop appropriate social skills and assertiveness, and counsel them about appropriate modes of behavior and dress if necessary.
- o Provide appropriate role models.
- o Develop the client's appreciation for the rewards that follow a job well done.
- o Be clear and honest in all communications.
- o Be explicit about program requirements.

- Conduct assessment in a nonthreatening manner.
- Ensure that extra instructional time will be supplied if needed, even for elective courses.
- Reassure clients of the appropriateness of their training programs.
- Help clients recognize the valuable skills they have developed as a result of their special need.

## Employee Career Plans Checklist

| | Yes | No | Uncertain |
|---|---|---|---|
| 1. Has identified several career/ job options | _____ | _____ | _____ |
| 2. Has identified job related skills e.g., word processing | _____ | _____ | _____ |
| 3. Has developed a job training plan | _____ | _____ | _____ |
| 4. Has implemented career/job training program | _____ | _____ | _____ |
| 5. Has consulted referral agencies | _____ | _____ | _____ |
| 6. Has reviewed plans with career counselor | _____ | _____ | _____ |
| 7. Has established timelines for completion of training program | _____ | _____ | _____ |

Note: In this exercise the participants could expand the checklist categories and add significant new ideas as appropriate.

## ACTIVITY 3 (COMPETENCY 3)

In this activity, the trainee will describe the referral process that should be used to assist adults in using training, counseling, and or special services.

Review: The career guidance specialist must assume the role of facilitator, catalyst and manager in developing corporate support for adult career development programs. Career referral requires knowledge of services available, internal and external to the corporate environment. The career placement resources available in the community must be inventories and used in conjunction with student placement information. Information about local referral sources is best obtained through:

- Personal contact
- Telephone surveys
- Mail surveys
- Networking
- Contacts
- Public relations efforts

It is important to plan a referral process consistent with corporate goals for employee training and/or retraining. In determining the final referral process, do not overlook existing internal corporate employee services. For example: testing, job placement, employee assistance, counseling, financial planning, and educational counseling are typical services. Affirmative action issues are also addressed in major corporations.

Exercise

List the basic and important steps in assuring that the best services are identified and accessed in relationship to an employee (client) stated needs.

## Basic Steps of Support Services: Identification and Acquisition

Note: Place in the order of importance and sequence

1.

2.

3.

4.

5.

6.

7.

ACTIVITY 4 (COMPETENCY 4)

In this activity trainees will discuss and suggest the best practice related to assessing the impact of program services on employee career and educational plans as they are implemented.

Review: The career guidance specialist will need to conduct follow-through studies for assessing the extent and commitment of employees in seeking assistance from referral sources in implementing their career plans. In organizing, conducting, and analyzing follow-up date, we need to know how well our program objectives are being achieved. Is the program assisting employees in developing new career training plans. Do the clients follow the career plans? Do they seek re-tooling? Do they go back to school? Do they maintain enrollment? Do they achieve sufficiently?

Use the following Basic Principles form to come to some agreement on the basic principles of an effective follow-up approach.

Secondly, have the participants discuss the direct benefits to the employer that would come from knowing how effective the clients were in implementing their plans and to what degree. Use the following form--Employer Benefits--to generate a list of benefits.

In summary, while we all know that impact and effectiveness data is important to all that we do, the following are some basic ideas for preparing your methods.

A. Basic data needed: Number of participants in program; use of educational services, use of occupational training programs, use of personal counseling services, impediments to use of services, reasons for dropping out, and evidences of successful use of employee assistance services.

B. Strategies for conducting studies:

1. Mail survey - post card questionnaire (see Appendix C)

2. Interviews - telephone and personal contact

C. Planning the follow-up activities:

1. Purpose

2. Objectives

3. Who best collects data

4. Personal limitations

5. Study activities to be used

6. Budget needs and timeline

7. Data analysis/how

8. Reporting of data - format, for whom, how, and when

Corporate human resource developers need this information to plan internal training programs that are timely and cost-effective. Follow-through studies provide data to determine what changes are needed in order to improve employee assistance programs. Data of this type leads to program changes, increased services to employees and refinement of corporate policies in the area of human resource development.

Module Evaluation

As a result of participating in this learning experience each participant should be able to:

1. Identify three internal referral services within the corporation

2. Identify three external referral services in the local/regional service area

3. Analyze career planning data for developing referral plans and strategies

4. Demonstrate use of career referral techniques for employee assistance programs

5. Develop and use follow-through procedures

The Participant Assessment Questionnaire is provided for use in assessing participant knowledge (see Appendix C).

Checklist: You should have the following:

- A resource list of training programs
- A list of services available in the community

## Basic Principles of Client Plan
## Follow-Up Form

Instructions: Review with the participants the following basic principles of client follow-up. Have individual or small groups review, modify, and expand this list.

| Basic Principles | Comments/Reactions |
|---|---|
| 1. To determine if users of the career services have made use of their retraining | |
| 2. To determine if users of the career services have contacted and used referral services | |
| 3. To ascertain what factors impeded employees from completing their training | |
| 4. To obtain information from employees as to the adequacy of training and career guidance | |
| 5. To determine how the corporation could be of further assistance to employees in need of career assistance | |
| 6. To determine the extent of employee usage of educational and occupational training opportunities. | |
| 7. | |
| 8. | |
| 9. | |
| 10. | |

# Employer Benefits From Client Follow-Up Data Form

Instructions: Realizing that our repeat opportunity to serve a specific employer conduct client assessment, counseling, and educational planning will be based upon the benefits they feel they are receiving. Prepare a list of possible benefits. Put the employers hat on and try to think of the impact data you would like to see to make future investment decisions.

## Employer Benefits

1. (Example)--Data is specific enough to aid in determining which educational institution is delivering what service in an effective and cost efficient way.
2.
3.
4.
5.
6.
7.
8.

# Participant Assessment Questionnaire

---

Introduction: Based upon information you have received about referral and follow-up services, how well prepared are you to initiate, conduct and evaluate such services ? Please circle one response only.

| Question | Response |  |  |
|---|---|---|---|
|  | Yes | No | Unsure |
| 1. Do you feel the referral service was clearly explained? | _____ | _____ | _____ |
| 2. Do you feel the follow-up process was clearly explained? | _____ | _____ | _____ |
| 3. Do you know the basic types of referral services available in the community? | _____ | _____ | _____ |
| 4. Do you know the basic procedures for conducting follow-up activities? | _____ | _____ | _____ |
| 5. Do you know the basic evaluation process for analyzing referral services? | _____ | _____ | _____ |
| 6. Do you know the basic evaluation process for analyzing follow-up services | _____ | _____ | _____ |

---

Note: All items should receive a YES response. If any item receives a NO or UNSURE response, the module trainer and the participant should meet to determine additional learning activities to reach competency n the weak area(s). Prepare sufficient copies for the training group.

## APPENDIX A

### REFERRAL SOURCES

**Employment Assistance**

State Employment Service
Private Industry Councils
Local/City governments

**Business**

Chamber of Commerce
National Alliance of Business
Trade associations
Professional and business women's clubs

**Education**

Community colleges
Public universities
Vocational education institutions
Adult education centers
Technical training centers
Schools for exceptional students
Clinics, therapists, or tutors
Vocational rehabilitation programs

**Social Service Organizations**

Social services
Health care and medical service providers
Community action groups
Housing assistance providers
Legal aid

**Community Groups**

Goodwill Industries
League of Women Voters
YMCA
YWCA
Advocacy groups
Civic Groups (e.g., Lions Clubs, Kiwanis, Rotary International, Civitan)

**Government Agencies**

Police and probation departments
Caseworker and group guidance counselors
Veterans Administration
Detention centers
Shelter care facilities
Cooperative extension services
Labor Department Jobs services
Civil Service Agencies
Mayor's Committee for Employment of the Handicapped
Office for Civil Rights

**Labor**

Advisory and craft committees
Labor unions

**Religious Groups**

Jewish Family Service
Catholic Welfare Bureau
Salvation Army

**Network of Organizations on Aging**

State Office of Aging
Area Agency on Aging
Senior centers
Senior nutrition programs
American Association of Retired Persons
National Council of Senior Citizens
National Council on the Aging
National Caucus and Center on Black Aged
National Urban League
National Association of Spanish-Speaking Elderly
Green Thumb

SOURCES: Brenda Lester, *A Practitioner's Guide for Training Older Workers* (Washington, DC: National Commission for Employment Policy, 1984); Michelle D. Sarkees, John L. Scott, and Joe E. Hill, *Job Placement Handbook for Protected Populations* (Athens: University of Georgia, 1981).

## SOURCES FOR REFERRAL ASSISTANCE

**Federal Agencies**

Regional Employment and Training Administration (U.S. Dept. of Labor)
Regional Economic Development Administration (U.S. Dept. of Commerce)
Small Business Administration (local representative office)

**State-level Agencies**

Department of Planning and Research
Department of Economic and Community Development
Department of Industrial Development
State-level JTPA planners
State Departments Responsible for Vocational Education, Community Colleges
Occupational Information Coordinating Committee
Bureau of Apprenticeship and Training

**Community Groups and Social Service Deliverers**

United Way
Community or Neighborhood Mental Health Center
YMCA-YWCA
Local television and radio stations
Chruch groups—e.g., Catholic Charities, Jewish Family Services
Local Food Pantries
Medical or Hospital Associations
Drug or Alcohol Abuse Counselors
Legal Aid Society
Local Ethnic or Neighborhood Clubs
Local Tenants Association
Local Crisis Counseling Centers
Local Information and Referral Services
Local Minority Group Associations
Local Women's Groups

**Local Government-related Agencies**

Mayor's Office or County Commissioner's Office
Local Employment Security Office
Local Interagency Coordinating Councils
City or County Industrial Development Commission
City or County Economic Development Commission
Private Industry Council
Employment and Education Commission(s)
City or County Social Services Department
City or County Housing Department

**Employer, Labor, and Private Sector Groups**

Local Union
Employee Group or Association at Nonunion Plants
Local Chamber of Commerce
Local Trade Association(s)
Banks or Lending Institutions

**Educational Groups**

Area Public Vocational-Technical Schools
Community Colleges or Local Branch of Four-year Institutions
Proprietary Schools

**Multijurisdictional Agencies**

Regional Planning Councils
Council of Governments
Multistate Growth and Policy Boards

SOURCE: Gale L. Zahniser and William L. Ashley, *Helping the Dislocated Worker: Planning Community Services* (Columbus: The National Center for Research in Vocational Education, 1984), p. 19.

## APPENDIX C

## POST CARD FOLLOW-UP--EDUCATION AND TRAINING PROVIDERS

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To: ________________________________________
(Student Services Office--Director or Contact Person)

From: ________________________________________
(EAP Counselor)

Subject: As per earlier agreement, I need your help in determining the progress of ____________________ (Employee-Client) since he/she was referred to your office. Could you please complete the following questions and add any additional information that you might have on this individual.

1. Registration Completed ____ (Yes) ____ (No) ______________ (Comment if no)

2. Enrollment Completed ____ (Yes) ____ (no)

   If yes, please describe achievement ______________________
   ________________________________________

   If no, please describe problem or planned completion ________
   ________________________________________

3. Title of Program Completed ______________________

4. Length of Program Completed ______________________

5. What occupation(s) does this training best address

   (a) ________, (b) ________, (c) ________

6. Would you recommend future training for this person?

   ____ (Yes) ____ (no)

   If yes, please specify course ______________________

7. Any other general comments: ______________________
   ________________________________________
   ________________________________________

**Please Return Form To:**

# APPENDIX D

## BACKGROUND READING ON AVAILABLE SUPPORT SERVICES

### Assessment

Assessment includes testing knowledge, aptitude, and interest, either through paper and pencil tests or through work samples—standardized job performance tasks designed for use in assessing the employability of disadvantaged individuals. Work samples are performed in structured environments; evaluations of behavior are based on observations.

### Career Counseling

Career counseling can include the following services: workshops exploring career options; career orientation sessions dealing with orientation to the world of work, self-assessment, employment choices, obtaining reasonable job accommodation, coping with special needs, and employment opportunities; credit courses in career exploration; workshops on "job hunting"; classroom presentations by employers or personnel officers; orientation to the career resource library; an employer resource file complete with company brochures, annual reports, job descriptions, and application forms; the use of volunteers from the community who serve as mentors (National Child Labor Committee 1985); and "job shadowing" experiences in which prospective employees observe workers in their day-to-day job tasks.

### Dependent Care

Dependent care includes day care and transportation for dependents. Also included are babysitting services, dependent health care benefits, and geriatric care.

### Employability Skill Development

Services relating to employability skills include the following: individual job design for special education clients; workshops on resume writing, interviewing, identifying job opportunities, accepting a job, terminating a job, and appropriate behavior, dress, and hygiene at work; education for clients in employment laws; and assertiveness training for clients. Also included are relocation assistance from employers to dislocated workers, including training in job search, resume preparation, and interview skills; financial assistance to cover travel costs and lodging for an interview; and financial assistance until the client is self-sufficient once more.

### Financial Assistance and Planning

These services include the following: workshops on personal money management and budgeting; employment of special needs students or clients as instructional assistants; debt and credit counseling; assistance with payments (for example, securing lower repayment rates and restructuring previous debts); and identification of funds in the program budget to purchase services. Other services include loans for work-related emergencies such as fares, lunch money, or for the purchase of work clothes or tools; and identification of public assistance programs.

In addition, a number of publicly funded income assistance programs exist to provide different levels of loss compensation and income support for varying lengths of time. Some programs protect special groups of workers affected by government policies and actions, disasters, and other specific circumstances. The unemployment insurance system, administered at the Federal-State level, is the most comprehensive income assistance program providing support to persons awaiting recall or searching for a new job. The Trade Adjustment Assistance program is the largest of the special programs provided by the Federal Government. It provides income maintenance support to workers whose jobs have been affected by import competition. Worker groups petition the U.S. Secretary of Labor, who in turn may certify that imports have adversely affected the workers' jobs. The most recent Federal assistance program that focuses on the dislocated worker falls under the Job Training Partnership Act. Title III of the JTPA provides for a separate, state-administered training and employment aid program for dislocated workers that requires State consultation with local private industry councils at key points of decision making.

## Information Services

Information services are varied and often include the following: a handbook of pertinent information directed toward special needs groups; information hotlines; client newsletters; a directory of appropriate role models who are willing to consult with clients; social events for special needs students or clients; the introduction of special needs clients to others who have successfully completed a training program; workshops on coping with "instructional anxiety"; use of an ombudsman familiar with special needs; recognition of clientele whenever possible in the full range of institutional or organizational publications and events; a special needs awareness day to promote the positive contributions of students or clients for the information of employers, staff, and fellow students or trainees; a scrapbook of articles and news items about special population students or clients; and the use of bilingual newsletters. Other services include complementary training, such as cardiopulmonary resuscitation or driver's education; cassette and floppy disc playback machines (which can be borrowed from the Library of Congress); a databank of special audiocassettes, disks, and multimedia packages of textbooks and other resources; audio- and videocassette copiers; periodicals in braille; radio reading service receivers; and toll-free hot lines when clientele is spread over a multistate area.

## Instructional Support Services

Instructional support services include: readers; interpreters; equipment and tools as needed, paid for or subsidized by the training deliverer; occupational therapy; prevocational education skills when needed (that is, orientation and counseling designed to assist students in determining the occupation areas for which they might best prepare, including training in work habits and skills applicable to a variety of jobs); taped textbooks and tests; and tape players. Also included are informal or formal tutoring; flexible application and registration procedures; assistance in reviewing and selecting equipment; individualized educational programs; paraprofessional aides to assist special needs students; remedial instruction; programs to attract students or clients into libraries to learn about services provided on campus or in the community, as well as other relevant information; and retraining workers who face layoff and who lack transferable skills.

In addition, various technical aids are becoming increasingly available, such as Total Talk and Type n' Talk terminals to make computer programming accessible to the blind; visualteks, which use a TV screen to magnify standard print materials for the visually impaired; devices to make scientific information and mathematical calculations accessible, such as light sensors, talking thermometers, liquid level indicators, thermoformed materials, and magnetic boards; and a thermoform machine that produces plastic raised impression copies of braille text as well as tactile charts, maps, and graphs.

### Job Placement Services

Specific job placement services include the following: job fairs; job clubs; job hot line telephone services; and the full range of placement options. These options include rehabilitation centers, sheltered workshops, work activity centers, work adjustment centers, placement in school system jobs, on-the-job training programs, work-study programs, part-time jobs, full-time employment, and placement into postsecondary institutions. Job placement services may develop a list of employers who hire individuals who are bilingual or have limited proficiency in English. A client "resume book" can be compiled for interested employers. Still other placement services are preparation for relocation and the use of local newspapers, radio, public service television, and public affairs programs to advertise and solicit job openings.

### Legal Counseling

Legal services can include legal assistance as needed for mortgage foreclosure, bankruptcy, immigration, divorce, and the like; and assistance in dealing with police, the courts, and probation officers. Other services include "awareness" information on how to deal with illegal questions that may be raised during job interviews; and the location of legal services for clients from the local bar association, Legal Aid, legal clinics, city prosecutors' offices, and the local court of common pleas and municipal court.

### Medical Services

Health care services normally include the following: provision of artificial limbs, orthopedic devices, glasses, and hearing aids; diagnoses, evaluations, and testing; speech and hearing therapy; surgical, psychiatric, or hospital care intended to reduce or remove the disability, and other restorative services; dental care; and self-care aides for disabled persons who need assistance in caring for themselves either on campus or at home. Disadvantaged clients and displaced workers may need health care or medical insurance. Many institutions and National organizations provide health care insurance for clients or members.

### Mobility Services and Transportation

These services include the following: transportation to and from campus or training sites; provision of wheelchairs; assistance to potential employers in identifying barriers to mobility at the workplace; rerouting and bus stop agreements with bus lines; Dial-a-Ride and Dial-a-Bus programs; tuition rebates to help commuters defray the cost of traveling to and from the campus; a student minibus system; centrally located parking areas on campus; parking privileges at reduced or no charge; maps and other special transportation information; information for employers about the costs of mobility-related modifications; mobility and transportation orientation; car pools; and a buddy system or escort service for students who are taking evening classes or studying late. (At some institutions, campus police provide this service.)

### Personal and Family Counseling

This type of service includes the following: termination-of-employment counseling for displaced workers; substance abuse counseling; counseling for personal problems; and seminars on topics of interest to prospective clients (for example, black history, technological advances in prosthetics, affirmative action, women's issues, or Indochinese culture. Crisis counseling and stress counseling can also be provided.

## Support Services in the Community

One of the more frustrating aspects of support service delivery is the difficulty in locating needed services that are available somewhere out there. However, if you know where and how to look, it is possible to find existing services—or create new ones—to meet your students' and clients' needs.

One place to start is to determine whether a directory of local, regional, or State service providers exists. If it does, contact the directory's compiler for information collected after its initial publication. In some areas, information is available through a telephone hot line. With or without a directory or hot line, you can network into existing service delivery organizations. Begin by contacting likely organizations: public agencies, private social service providers, civic and social organizations, consumer and ethnic advocacy groups, employers and labor unions, financial institutions, utility companies, and campus organizations. Hicks, McGreevy, and Broderick (1981) suggest that the following checklist be used in building a network:

____ Identify all the organizations—public and private—that in any way assist individuals with career planning and job search.

____ Contact as many organizations as you can, requesting information on their programs and telling them about your program and your needs.

____ Identify at least three organizations of each type (e.g., public agencies, civic organizations) that you wish to draw more closely into your network.

____ Offer assistance and the use of your facilities.

____ Ask to be placed on their mailing list and place them on yours.

____ Maintain at least one professional contact in each organization, someone with whom you can exchange information and build a stronger network.

The following list of community groups and the services they usually provide was adapted from Anderson and Naylor (1985) and expanded to include information from Zahniser and Ashley (1984). The column headed *Community Resources* includes both specific kinds of aid and groups that can serve as resources for your organization.

| Community Resources | Types of Services Commonly Found |
|---|---|
| Aid to Families with Dependent Children | Monthly financial assistance for qualified families |
| Campus fraternities, sororities, and service clubs | Volunteers for tutoring, mobility assistance, note taking, reading, and mentoring |
| Community organizations (church groups, United Way, special task forces, Salvation Army, volunteer groups, and so forth) | Financial, planning, and housing assistance<br>Job location assistance<br>Emergency food and housing<br>Personal and immigration counseling |
| Financial institutions | Credit and financial planning information<br>Advice on averting a financial crisis<br>Advice to help workers, local government, and other interested groups explore the feasibility of employee buy-out options for companies that are planning to close |
| Job Training Partnership Act, Title III, Dislocated Workers—Service Delivery Areas | Financial assistance to dislocated workers designated to support—<br>• job search assistance<br>• job development<br>• job training<br>• commuting<br>• personal and financial counseling<br>• pre-layoff assistance<br>• relocation assistance<br>Cash assistance through wages or needs-based payment; funding for child care, transportation, health care benefits, or medical services<br>A wide range of innovative services, such as assuming costs for public transportation, child care, and job-related medical expenses; procurement of eye care at welfare costs; interpreter services for immigrants and resident aliens |
| Labor unions | Apprenticeship training<br>Members' benefits and job security<br>Coordination of JTPA, Title III, aforementioned services |
| Mental health agencies | Counseling for substance abuse, spouse/child abuse, personal trauma, and suicide prevention; a wide range of counseling services |

| Community Resources | Types of Services Commonly Found |
|---|---|
| Social welfare groups | Medical assistance<br>Food stamps<br>Counseling<br>Child welfare<br>Surplus food distribution |
| State employment or job service | Unemployment insurance benefits<br>Career counseling<br>Testing<br>Labor market information<br>Placement services |
| Utility companies | Utility services information<br>Lifeline rates during periods of unemployment |
| Vocational rehabilitation | Counseling<br>Occupational testing and analysis<br>Financial assistance for retraining and related expenses |

## Support Services Provided by Employers

Although the greater portion of support services lead to employment, bear in mind that employers themselves also offer valuable services. These services do not typically originate in any one policy but represent a response to a number of considerations, such as affirmative action requirements and community relations. The firm's wish to improve its current work force, commitment to its employees, and sense of fair play may also enter into the decision to provide support services. It is important for those responsible for placement to be aware of the variety and extent of services offered by employers in order to provide the best possible employment for the students or clients. The following support services may be available from employers.

### Preparing for the Job

A number of support services deal with job preparation. Job redesign is the cooperative process whereby alterations in the work site, job responsibilities, work schedule, and salary structures are made in order to eliminate barriers to the employment of special population workers. Easy to accomplish modifications of the work site include the following: rearranging files or shelves to make them accessible to mobility-impaired workers; widening access areas between fixtures to accommodate wheelchairs; placing Braille labels on shelves, elevators, or signs; adjusting the height of equipment; adjusting equipment controls; installing special holding devices on desks, machines, or benches; and installing touch-tone telephones for those who cannot dial. Supportive forms of employment devised to help special population workers learn their jobs ordinarily include on-the-job training and internships.

### On the Job

Employers can provide numerous on-the-job support services. Some examples are careful placement of handicapped employees to maximize their abilities; safety programs responsive to needs of mobility-impaired employees; a team or buddy system to serve as liaison in orienting new workers; a system of rewards for newly acquired skills; and child care provided on site. Employers can offer programs that help special needs individuals understand the importance of completing work tasks on time, relate positively to authority, meet quality control standards, develop appropriate work behaviors (especially those that may not be obvious), report difficulties and ask for help, and relate to co-workers in a cooperative, nonhostile manner.

### When a Job Is Terminated

Several support services are possible for members of special populations whose jobs are terminated. These include outplacement counseling offered as soon as a plant closure or layoffs are expected, aptitude testing and interest assessment conducted before employment is terminated, early financial counseling, and outplacement counseling.

### Program Assistance

Private employers may also provide the following services: assessing selected training programs that may be relevant to the workplace and for which academic credit may be awarded; assisting with the development of curricula and training standards and the establishment of entrance criteria; and helping program staff recruit and screen program candidates, establish recruitment standards, find qualified instructors, administer end-of-course tests, and place students or clients. Other services include helping training institutions, the local chamber of commerce, and local governing bodies identify available vacancies and job qualifications; and helping training institutions obtain the best possible equipment for retraining programs.

Source: Bhaerman, R.D., Belcher, J.O., and Merz, H.D., 1986. A Helping Hand: A Guide to Customized Support Services for Special Populations. Columbus, OH: The Ohio State University, National Center for Research in Vocational Education.

EXHIBIT

## NATIONAL ORGANIZATIONS

### Aging

1. Aging in America, 1500 Pelham Pkwy., S., Bronx, NY 10461.
2. American Association of Homes for the Aging, Suite 770, 1050 17th St. NW, Washington, DC 20036.
3. American Association of Retired Persons, 1909 K St., NW, Washington, DC 20049.
4. Heartline/National Association of Older Americans, 1325 G St., NW, Washington, DC 20005.
5. Legal Counsel for the Elderly, 1909 K St., NW, Washington, DC 20049.
6. Legal Services for the Elderly Poor, 132 W 43rd St., 3rd Floor, New York, NY 10036.
7. National Association for Human Development, 1620 Eye St., NW, Washington, DC 20006.
8. National Clearinghouse on Aging, Administration on Aging, 330 Independence Ave., SW, Washington, DC 20201.
9. National Council on the Aging, 600 Maryland Ave., SW, West Wing 100, Washington, DC 20024.
10. National Institute of Senior Centers, c/o National Council on the Aging, 600 Maryland Ave., SW, West Wing 100, Washington, DC 20024.
11. National Senior Citizens Law Center, 2025 M St., NW, Suite 200, Washington, DC 20036.
12. Urban Elderly Coalition, 600 Maryland Ave., SW, West Wing 204, Washington, DC 20024.

### Appalachians

13. Appalachia Educational Laboratory, P.O. Box 1348, Charleston, WV 25325.
14. Appalachian Regional Commission, 1666 Connecticut Ave., NW, Washington, DC 20235.

### Asian Americans

15. Asian American Legal Defense and Education Fund, 99 Hudson St., 12th Floor, New York, NY 10013.
16. Chinese for Affirmative Action, 17 Walter U. Lum Pl., San Francisco, CA 94108.
17. China Institute in America, 125 E. 65th St., New York, NY 10021.
18. Department of Health & Human Services, Division of Asian American Affairs, 200 Independence Ave., SW, Room 419E Hubert Humphrey Bldg., Washington, DC 20201.

*Continued*

Exhibit

19. Japanese American Citizens League, 1765 Sutter St., San Francisco, CA 94115.

20. National Association for Asian and Pacific American Education, 3621 Rue Mignon, New Orleans, LA 70114.

21. National Pacific Asian Resource Center on Aging, 811 First Ave., Suite 210, Seattle, WA 98104.

22. Organization of Chinese Americans, 2025 Eye St., NW, Suite No. 926, Washington, DC 20006.

23. U.S. Coordinator for Refugee Affairs, Department of State, Room 7526, Washington, DC 20520.

24. Vietnam Foundation, 6713 Lumsden St., McLean, VA 22101.

**Black Americans**

25. Alpha Kappa Alpha, 5656 S. Stony Island Ave., Chicago, IL 30637.

26. Alpha Phi Alpha, 4432 Martin Luther King Dr., Chicago, IL 60653.

27. Black Veterans, Inc., 1119 Fulton St., Brooklyn, NY 11238.

28. Delta Sigma Theta, 1707 New Hampshire Ave., NW, Washington, DC 20009.

29. National Association for the Advancement of Colored People, 186 Remsen St., Brooklyn, NY 11201.

30. National Caucus and Center on Black Aged, 1424 K St., NW, Suite 500, Washington, DC 20005.

31. National Urban League, 500 E. 62nd St., New York, NY 10021.

**Children/Family**

32. The Childrens Foundation, 1420 New York Avenue, NW, Suite 800, Washington, DC 20005.

33. Child Welfare League of America, 67 Irving Place, New York, NY 10003.

**Correctional**

34. American Correctional Association, 4321 Hartwick Rd., Suite L 208, College Park, MD 20740.

35. Association of State Correctional Administrators, 320 First St., NW, Room 200, Washington, DC 20534.

36. Court Employment Project, 346 Broadway, New York, NY 10013.

37. National Ex-Offender Grant Alliance, 6910 Green Manor Dr., Louisville, KY 40207.

38. Offender Aid and Restoration, The Old Albemarle Jail, 409 E. High St., Charlottesville, VA 22901.

*Continued*

Exhibit

39. Osborne Association, 105 E. 22nd St., Rm. 811, New York, NY 10010.

40. Volunteer Prison League, Volunteers of America, 3939 N. Causeway Blvd., Suite 202, Metairie, LA 70002.

41. Women's Prison Association, 110 Second Ave., New York, NY 10003.

42. Correctional Education Association, 1400 20th St., SW, Washington, DC 20036.

**Dislocated Workers**

43. Human Resources Development Institute (AFL-CIO), 815 16th St., NW, Washington, DC 20006.

44. Labor Management Services Administration, U.S. Department of Labor, 200 Constitution Ave., NW, Washington, DC 20210.

45. National Association of Counties, 440 First St., NW, Washington, DC 20001.

46. National Governors Association, 444 North Capitol St., NW, Washington, DC 20001.

47. Northeast-Midwest Institute, House Annex #2, Room 530, Washington, DC 20515.

**Handicapped**

48. American Coalition of Citizens with Disabilities, 1200 15th St., NW, Suite 201, Washington, DC 20005.

49. American Council of the Blind, 1211 Connecticut Ave., NW, Suite 506, Washington, DC 20036.

50. American Deafness and Rehabilitation Association, 814 Thayer Ave., Silver Spring, MD 20910.

51. American Speech-Language-Hearing Association, 10801 Rockville Pike, Rockville, MD 20852.

52. Arthritis Foundation, 1314 Spring St., NW, Atlanta, GA 30309.

53. Association for Children and Adults with Learning Disabilities, 4156 Library Rd., Pittsburgh, PA 15234.

54. Association for Education and Rehabilitation of the Blind and Visually Handicapped, 206 W. Washington St., Suite 320, Alexandria, VA 22314.

55. Association on Handicapped Student Services Programs in Postsecondary Education, P.O. Box 21192, Columbus, OH 43221.

56. Better Hearing Institute, 1430 K St., NW, Suite 700, Washington, DC 20005.

57. The Council for Exceptional Children, 1920 Association Dr., Reston, VA 22091.

58. ERIC Clearinghouse of the Handicapped and Gifted, 1920 Association Dr., Reston, VA 22091.

59. Gallaudet College, Florida Ave. at Seventh St., NE, Washington, DC 20002.

*Continued*

Exhibit

60. Goodwill Industries of America, 9200 Wisconsin Ave., Bethesda, MD 20814.

61. Helen Keller National Center for Deaf-Blind Youth & Adults, 111 Middle Neck Rd, Sands Point, NY 11050.

62. Information Center for Individuals with Disabilities, 20 Park Plaza, Rm. 330, Boston, MA 02116.

63. National Association of the Deaf, 814 Thayer Ave., Silver Spring, MD 20910.

64. National Association for Deaf-Blind, 2703 Forest Oak Circle, Norman, OK 73071.

65. National Association for Visually Handicapped, 305 E. 24th St., 17-C, New York, NY 10010.

66. National Easter Seal Society, 2023 W. Ogden Ave., Chicago, IL 60612.

67. National Information Center for Handicapped Children and Youth, Closer Look, Box 1492, Washington, DC 20013.

68. Parent Education Advocacy Center, 228 S. Pitt St., Suite 300, Alexandria, VA 22314.

69. Presidents Committee on Employment of the Handicapped, Washington, DC 20210.

70. Stout Rehabilitation Research and Training Center, University of Wisconsin, Menomonie, WI 54751.

71. Vision Foundation, Two Mt. Auburn St., Watertown, MA 02172.

**Hispanic**

72. ASPIRA of America, 114 E. 28th St., New York, NY 10016.

73. Chicano Training Center, 7145 Avenue H, Houston, TX 77011.

74. Mexican American Legal Defense and Educational Fund (MALDEF), 28 Geary, San Francisco, CA 94108.

75. National Coalition of Hispanic Mental Health and Human Services Organization, 1030 15th St., NW, Suite 1053, Washington, DC 20005.

76. National Council of La Raza, 20 F St., 2nd Fl., Washington, DC 20001.

77. Hispanic Institute in the United States, 612 W. 116th St., New York, NY 10027.

78. Hispanic Public Affairs Association, P.O. Box 5488, Friendship Heights Station, Washington, DC 20016.

79. Mexican-American Opportunity Foundation, 670 Monterey Pass Rd., Monterey Park, CA 91754.

80. National Puerto Rican Forum, 450 Park Avenue, S., New York, NY 10016.

*Continued*

Exhibit

**Limited English**

81. Bilingual Vocational Training Program, Canadian Valley Area Vo-Tech Program, District #6, El Reno, OK 73036.

82. Center for Applied Linguistics, 3520 Prospect, NW, Washington, DC 20009.

83. Chinese-English Translation Assistance Group, Box 400, Kensington, MD 20895.

84. Midwest Resource Center for Bilingual/Bicultural Education, Bilingual Education Service Center, 500 S. Dwyer Ave., Arlington Heights, IL 60005.

85. National Association for Bilingual Education, 1201 16th St., NW, Room 405, Washington, DC 20036.

86. National Center for Research in Vocational Education, 1960 Kenny Rd., Columbus, OH 43210.

87. National Clearinghouse for Bilingual Education, 1555 Wilson Blvd., Suite 605, Rosslyn, VA 22209.

88. Northwest Educational Cooperative, 500 S. Dwyer Ave., Arlington Heights, IL 60005.

89. Regional Bilingual Training Resource Center, City of New York Board of Education, Center for Bilingual Education, 110 Livingston St., Rm. 224, Brooklyn, NY 11202.

90. Teachers of English to Speakers of Other Languages, 202 D.C. Transit Bldg., Georgetown University, Washington, DC 20057.

**Migrants**

91. Broward County Migrant Education Center, Region 111, 160 N. Fifteenth St., Ft. Lauderdale, FL 33311.

92. Center for the Study of Migrant and Indian Education, P.O. Box 329, Toppenish, WA 98948.

93. East Coast Migrant Health Project, 1234 Massachusetts Ave., NW, Rm. 623, Washington, DC 20005.

94. Migrant Division, Department of Labor, 601 D St., NW, Rm. 314, Washington, DC 20213.

95. Migrant Education Resource Center, 312 Third St., S., Nampa, ID 83651.

96. Migrant Education Service Center, 3000 Market St., SW, Salem, OR 97301.

97. Migrant Legal Action Program, 806 15th St., NW, Suite 600, Washington, DC 20005.

98. Workers' Defense League, 15 Union Square, New York, NY 10003.

*Continued*

Exhibit

**Native Americans**

99. Americans For Indian Opportunity, 1140 Connecticut Avenue, NW, Suite 301, Washington, DC 20036.

100. Bureau of Indian Affairs, 1951 Constitution Ave., NW, Washington, DC 20245.

101. Bureau of Indian Affairs, Office of Indian Education Programs, Indian Education Resources Center, Box 1788, Albuquerque, NM 87103.

102. Department of Higher Education, Navajo Division of Education, P.O. Drawer S, Window Rock, AZ 86516.

103. Illinois Indian Training and Employment Program, 1124 W. Granville, Chicago, IL 60660.

104. National Congress of American Indians, 804 D St., NE, Washington, DC 20002.

105. National Indian Education Association, 1115 Second Ave., S, Minneapolis, MN 55403.

106. National Indian Training and Research Center, 2121 S. Mill Ave., Suite 218, Tempe, AZ 85282.

107. National Indian Youth Council, 201 Hermosa, NE, Albuquerque, NM 87108.

108. National Urban Indian Council, 2258 S. Broadway, Denver, CO 80210.

109. Native American Task Force for Vocational Education, 1626 High St., Denver, CO 80218.

110. North American Indian Association, 360 John R, Detroit, MI 48226.

111. Office of Indian Opportunity Referral Center, 1410 E. Forty-sixth St., N, Tulsa, OK 74126.

112. United Indians of All Tribes Foundation, Daybreak Star Arts Center, Discovery Park, P.O. Box 99253, Seattle, WA 98199.

113. United Native Americans, 7787 Earl Ct., El Cerrito, CA 94530.

**Rural**

114. American Rural Health Association, 100 Seventeenth St., NW, Washington, DC 20036.

115. Farmers Home Administration, U.S. Department of Agriculture, Washington, DC 20250.

116. Green Thumb, 1401 Wilson Blvd., Suite 108, Arlington, VA 22209.

117. Housing Assistance Council, 1025 Vermont Ave., NW, Suite 606, Washington, DC 20005.

118. Office of Fair Housing and Equal Opportunity, Housing and Urban Development, Washington, DC 20410.

119. Rural America, 1302 18th St., NW, Suite 302, Washington, DC 20036.

120. Rural American Women, 1522 K St., Suite 700, Washington, DC 20005.

*Continued*

Exhibit

121. Southern Rural Development Center, P.O. Box 5406, Mississippi State University, Mississippi State, MI 39762.

## Single Parents

122. Parent Support-Group Project, 294 Washington St., Suite 630, Boston, MA 02108.

123. Parents Without Partners, 7910 Woodmont Ave., Suite 1000, Bethesda, MD 20814.

## Veterans

124. Disabled American Veterans, 3725 Alexandria Pike, Cold Spring, KY 41076.

125. National Veteran's Outreach Program, 1017 N. Main, Suite 200, San Antonio, TX 78212.

126. Veterans Education Project, P.O. Box 42130, Washington, DC 20015.

127. Vietnam Veterans Agent Orange Victims, 93 Prospect St., Stamford, CT 06902.

128. Vietnam Veterans of America, 1133 Broadway, New York, NY 10010.

129. Vietnam Veterans Institute for Research and Advocacy, 1700 K St., NW, Suite 503, Washington, DC 20005.

130. Vietnam Veterans Leadership Program, 806 Connecticut Ave., NW, Washington, DC 20525.

131. Vocational Rehabilitation for Disabled Veterans, Veterans Administration, 810 Vermont Ave., NW, Washington, DC 20420.

## Women

132. Advocates for Women, 414 Mason St., San Francisco, CA 94102.

133. Displaced Homemakers Network, Lower Level B, 1325 G St., NW, Washington, DC 20005.

134. National Organization for Women, 425 13th St., NW, Suite 723, Washington, DC 20004.

135. National Womens' Employment & Education, P.O. Box 959, 118 N. Broadway, Suite 622, San Antonio, TX 78294.

136. Tradeswomen, P.O. Box 40664, San Francisco, CA 94140.

137. Wider Opportunities for Women, 1325 G St., NW, Lower Level, Washington, DC 20005.

138. Women Employed, Five S. Wabash, Suite 415, Chicago, IL 60603.

139. Women's Equity Action League, 805 15th St., NW, Suite 822, Washington, DC 20005.

140. Women's Information, Referral and Education Service, c/o Junior League of Boston, 117 Newbury St., Boston, MA 02116.

*Continued*

Exhibit

**General Services Providers**

141. Al-Anon Family Group Headquarters, One Park Ave., New York, NY 10016.

142. Alcoholics Anonymous World Service, P.O. Box 459, Grand Central Station, New York, NY 10163.

143. American Civil Liberties Union, 132 W. 43rd St., New York, NY 10036.

144. Chamber of Commerce of the U.S., 1615 H St., NW, Washington, DC 20062.

145. Federation Employment and Guidance Service, 114 Fifth Ave., New York, NY 10011.

146. Head Start, Administration for Children, Youth and Families, Office of Human Development, P.O. Box 1182, Washington, DC 20013.

147. National Alliance of Business, 1015 15th St., NW, Washington, DC 20005.

148. National Association of Private Industry Councils, 2001 S St., NW, Suite 500, Washington, DC 20009.

149. National Association of Recovered Alcoholics, P.O. Box 95, Staten Island, NY 10305.

150. National Association on Drug Abuse Problems, 355 Lexington Ave., New York, NY 10017.

151. National Career Development Association, 5999 Stevenson Ave., Alexandria, VA 22304.

152. National Child Labor Committee, 1501 Broadway, Suite 1111, New York, NY 10036.

153. National Clearinghouse for Drug Abuse Information, National Institute of Drug Abuse, Alcohol, Drug Abuse, and Mental Health Administration, 5600 Fishers Lane, Rm. 10-A53, Rockville, MD 20857.

154. National Clearinghouse for Legal Services, 407 S. Dearborn, Suite 400, Chicago, IL 60605.

155. National Coalition for the Homeless, 105 E. 22nd St., New York, NY 10010.

156. National Council on Alcoholism, 733 Third Ave., New York, NY 10017.

157. National Legal Aid and Defender Association, 1625 K. St., NW, 8th Fl., Washington, DC 20006.

158. National Ridesharing Info Center, Federal Highway Administration, Room 315, Washington, DC 20590.

159. National Used Car Recall Hotline, National Highway Traffic Safety Administration, U.S. Department of Transportation, Seventh & D Sts., SW, Washington, DC 20590.

160. Opportunities Industrialization Centers of America, 100 W. Coulter St., Philadelphia, PA 19144.

161. Salvation Army, 799 Bloomfield Ave., Verona, NJ 07044.

162. Second Harvest, The National Foodbank Network, 1001 N. Central, Suite 303, Phoenix, AZ 85004.

163. 70001 LTD., 600 Maryland Ave., SW, West Wing, Suite 300, Washington, DC 20024.

164. VD National Hotline, American Social Health Association, 260 Sheridan Ave., Palo Alto, CA 94306.

165. Work Incentive Program, 605 G St., NW, Room 800, Washington, DC 2000l.

# ABOUT THIS MODULE #5

| | GOAL |
|---|---|
| FACILITATE CLIENT SKILL DEVELOPMENT | After completing this module, counselors will be able to present a strategy for helping employees acquire and maintain employability skills. |

| | |
|---|---|
| Competency #1: | Specify learning, work maturity, and job search skills necessary to employees' success in the employment setting. |
| Competency #2: | Identify and describe the use of resources to help employees develop learning, work rmaturity, and job search skills. |
| Competency #3: | Present plans for conducting workshops on study skills, work maturity skills, job search skills, and skills in selecting an educational institution. |
| Competency #4: | Prepare a form to use in obtaining evaluation of the employability skill development workshops. |

In today's competitive job market, it is imperative that people develop skills that will enable to them to compete successfully in the struggle to acquire and retain jobs. Employers hire individuals who not only have job skills, but who can communicate that they have these skills and convince employers that they are the most qualified persons for the job. Once employed, the same individuals must demonstrate their value by exhibiting their ability to learn new information and skills and by demonstrating positive attitudes and behaviors as they function in the work setting. This module will help you identify the specific employability skills sought by employers and then plan ways for helping employees in the program acquire those skills.

The standard format used in this and other modules for this program is as follows:

- About This Module: This section presents (1) the goal--a statement of what one whould be able to accomplish by completing the module, and (2) an outline of the competencies thought to be most critical to achieving the goal.

- Overview: The overview offers an introduction to the topic and describes the purpose and content of the competency to be addressed.

- Learning Experiences: Each learning experience is designed to help users develop a specific competency. Within this section of the module are the following components:

  Objective: This statement describes the skills the trainee must be able to demonstrate at the conclusion of the learning experience.

  Review: This section includes individual exercises the trainees complete to domonstrate understanding of the competency. It also provides opportunities for immediate feedback regarding their understanding and progress.

  Activity: The activity is designed to engage the trainee in performing the tasks for which the competency is required. The suggested activities involve a blend of development, presentation, and "hands-on" participant activities, such as games and role playing.

  Checklist: The checklist is an itemized list of materials the trainee should have developed, acquired, and assembled through the learning experience.

- Evaluation: This section of each module contains information and instruments that can be used to measure what workshop participants need prior to training and what they have accomplished as a result of training. Included in this section are a Pre- and Post-Participant Assessment Questionnaire and a Trainer's Assessment Questionnaire.

- References. All major sources that were used to develop the module are listed in this section. Also, major materials resources that relate to the competencies presented in the module are described and characterized.

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COMPETENCY #1

**Specify learning, work maturity, and job search skills necessary to employees' success in the employment setting.**

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Work preparation must include development of the nontechnical as well as the technical skills needed to function successfully in the work force. Employers are unanimous in their desire for employees who are reliable, self-confident, responsible, productive, cooperative, ethical, and willing to learn. They want prospective employees to convey these qualities at the pre-employment and job promotion stages, as well as possess them as ongoing employees, by showing interest in and enthusiasm for their job and by presenting positive appearances and attitudes.

The specific qualities employers seek in the people they hire and retain are summarized in the following list of skills:

WORK MATURITY SKILLS

Present a Positive Image
- Follow good grooming practices
- Practice good health habits
- Dress appropriately for the job
- Exhibit self-confidence

Exhibit Positive Work Attitudes
- Use basic social skills
- Be creative and willing to learn
- Take pride in your work

Practice Good Work Habits
- Maintain regular attendance
- Be thorough and diligent
- Follow safety practices

Practice Ethical Behavior
- Exercise integrity and good judgment
- Respect property
- Follow safety practices

Communicate Effectively
- Demonstrate spoken communication skills
- Demonstrate written communication skills
- Demonstrate nonverbal communication skills
- Demonstrate good listening skills

Accept Responsibility
- Use initiative
- Use problem-solving techniques
- Manage personal responsibilities

Cooperate with Others
- Work as a member of a team
- Work under supervision
- Cope with job frustration, conflict, and/or prejudice

## JOB SEARCH SKILLS

Prepare for the Job Search
- Choose a job and prepare for employment
- Compile information for application and/or resume
- Prepare a resume

Search for Available Jobs
- Identify potential employers
- Decide which employers to contact first
- Follow job leads

Apply for Jobs
- Fill out applications
- Present applications

Interview for the Job
- Prepare for the interview
- Conduct the interview
- Follow up on the interview

Handle Job Offers
- Find out information about the job and company
- Negotiate for the job

Since growth in any job requires ongoing knowledge and skill acquisition, employers want employees who are able and willing to learn on an ongoing basis. Some of the knowledge and tasks required for skill renewal are listed below:

## LEARNING SKILLS

### Choose an Education or Training Institution or Program

- Learn the program offerings of various education and training institutions
- Find out when programs are offered
- Determine the tuition costs Acquire and completely fill out all forms for registration

### Manage Logistics of Course Attendance

- Explore ways to meet financial obligations of further education
- Plan transportation methods and schedules
- Coordinate work schedule with course schedule
- Identify and acquire any necessary support services needed for successful attendance on education/training

### Practice Good Study Habits

- Establish an appropriate setting for learning
- Allocate time for study
- Follow concentration techniques
- Take notes and/or summarize relevant information

### Practice Good Listening Skills

- Give attention to the instructor
- Record significant facts and information
- Ask questions

### Practice Good Test Taking Skills

- Read something on test taking techniques
- Request help from institutions on practice taking tests
- Obtain special assistance from counselor in educational in institution if special assistance is needed for test taking (tape recording, verbal instructions, verbal test taking).

## Employability: The Skills Employers Want Workers to Have

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OBJECTIVE: Identify the skills you feel are important to specific areas of employability skill development.

REVIEW: Discuss the importance of various learning, work maturity and job search skills and indicate those most crucial to job success and promotion.

ACTIVITY: Categorize skills according to specific competencies required for learning, work maturity and job search.

CHECKLIST: You should have the following:

- A list of competencies required for learning, work maturity, and job search activities.

REVIEW:

Review the information in the OVERVIEW section. Then, discuss with other trainees the importance of various workplace skills. Use the lists that appear in the OVERVIEW to trigger recognition of the various skills. Then, through an individual brainstorming activity, identify from the skills lists those skills you feel workers most frequently lack in learning, work maturity, and job search, that you might want to deal with in your counseling or group skill building activities. List the skills in priority order.

List of Skills

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When you have completed the REVIEW activities, discuss your conclusions with at least one other trainee. Solicit comments on your understanding and application of the concepts.

ACTIVITY:

Group the skills you listed according to specific areas of competency. Group similar skills together. For example, in considering job search skills, group together all the skills that relate to job/labor market knowledge. Examples of competency areas in learning, work maturity, and job search are listed below. Under each heading, write the skills employees would need to become more competent in each area. Add other headings to help your classification if appropriate.

WORK MATURITY

Job Tasks

Interpersonal Relationships

Company Loyalty

JOB SEARCH

Job/Labor Market Knowledge

Presentation of Self to Hiring Employers

Job Selection

LEARNING

Enrollment in Academic and Skill Training Classes

The process and Responsibility of Learning

After you have categorized the employability skills as they relate to the general headings noted above, discuss the comprehensiveness of your list with other trainees. Then, write competency statements for each of the topic headings. Begin each competency statement with an action verb, such as perform, identify, follow, practice, and so forth.

Competency Statement Example: (Job Task Category)

Perform job tasks accurately, completely, and in a timely manner according to your supervisor's specifications.

When you are finished, ask several traineess to review your competency statements and related skills. Revise the outline based on their input. Then, prepare a final list of competencies and skills necessary for employees' job market success.

### LEARNING COMPETENCIES

### WORK MATURITY COMPETENCIES

### JOB SEARCH COMPETENCIES

| CHECKLIST: Do you have the following: | Yes | No |
|---|---|---|
| o A list of learning, work maturity, and job search competencies necessary for employees' job market success. | ___ | ___ |

## OVERVIEW

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COMPETENCY #2: **Identify and describe the use of resources to help employees develop learning, work maturity, and job search skills.**

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Three types of resources can be helpful in providing employability skill development assistance to employees. These are people, activities, and materials resources.

### People Resources

Employers are valuable sources of advice on the content or focus of employability skill training. They can also offer guidance to employees by (1) observing and critiquing the employees' performance on the job and (2) providing additional information about their specific expectations for their employees.

Peers who are successfully functioning in their jobs can discuss the importance of various characteristics, like good attitudes and behaviors. They can also give testimonials about the problems they have encountered and ways they have dealt with such problems.

Family members can be alerted to the kinds of non-job-specific skills sought by employers and who can facilitate such skill development in the home environment.

*Educators* can provide material resources that will enhance employees' understanding of employability skills and their value.

### Activity Resources

*Workshops and seminars* are activities that can deliver employability skill guidance and training. In addition to workshops counselors may provide through an employee assistance program, many professional associations and private organizations offer such skill building workshops and training programs. To obtain lists of such activities, contact the individual associations and organizations.

*Education and training programs* offered by vocational/ technical schools, technical institutes, business and trade schools, proprietary schools, and community colleges provide opportunities for employees to enhance and/or develop the specific skills they need to succeed in the job market. Study Skill Guidelines for use in helping employees develop study skills are included in Appendix A.

### Materials Resources

*Publications*--government, commercial, union, employer and firms as well as trade associations and public libraries are other sources of information.

*Curricula* designed to provide instruction and practice to individuals engaged in employability skill development are another materials resource. CONNECTIONS: School and Work Transitions is a new resource from the Center at The Ohio State University. It offers a comprehensive, coordinated set of materials based on up-to-date research to help prepare all individuals for work transitions.

- The Employer's Choice is a research-based, multimedia set of instructional materials to prepare individuals for job market success. It contains the following components:

  Priorities That Count uses data from completed employer questionnaires to show how employers are influenced to hire and retain workers. Through selected activities, individuals are led to develop a realisitc view of employer standards and to make plans for acquiring the skills employers want.

  What Works in the Job Search uses a videotape of simulated job interviews to present facts about employers' responses to applicants at each stage of the job hiring process. By assessing the videotaped interviews and by role playing the job application and interview process, individuals learn to perfect their job search techniques.

  On the Job uses case studies to present real-life situations and experiences that young people encounter in getting a job, becoming an insider, training at the work site, and learning a job. By examining the consequences of various behaviors and attitudes, individuals using these materials are able to recognize that their own behaviors and attitudes, while possibly different, also affect their job success.

- Workskills is an employability skill development curriculum which is competency-based and written at a low reading level. The components of this resources include the following:

  Orientation to the World of Work contains practical and interesting activities that help people match their personal needs and abilities to different job requirements.

  Job Search Skills contains five competency-based modules on individual aspects of the job search. The competencies addressed in this skill program are identified in the Job Search Competency Record page in Appendix B. Also in the Appendix are two sets of guidelines that could be used in employee programs: Appendix C: Guidelines for Completing an Application and Appendix D: Guidelines for Interviewing.

> Work Maturity Skills contains a set of seven competency-based modules about behaviors employers seek in their workers. The work maturity competencies are outlined on the Work Maturity Competency Record page in Appendix E.

The above examples are used because many of these materials are individualized learning materials that one could study and use to self test.

In addition to the Guidelines for Completing an Application and Guidelines for Interviewing found in Appendices C and D, Appendix D includes Study Skill guidelines, and Guidelines for Choosing an Educational Institution/Program (Appendix F).

Obviously there are many resources one can use in delivering employability skill guidance and training. The counselor's responsibility is to become aware of the variety of available resources and of ways to use them. Any counseling setting needs to have examples and ready access to client give away materials.

## Resources for Employability Skill Development

---

**OBJECTIVE:** List the type, name, location, cost, and use of at least three resources you would use to help employees develop learning, work maturity, and job search skills.

**REVIEW:** Review the resources described in the OVERVIEW along with other resources you have available to you, and select ones to use to guide employees in their employability skill development.

**ACTIVITY:** Evaluate each resource you listed according to type, location, cost and use, and prepare a final list of resources to locate and use.

**CHECKLIST:** You should have the following:

- o A list of resources to use in helping employees to develop learning, work maturity, and job search skills.

---

REVIEW:

Read about the resources described in the OVERVIEW. Obtain copies of any materials you would like to review. Also review the guidelines contained in the Appendices K-P. List resources you think would help you deliver employability skill development assistance to the employees. Consider all resources you have available to you--people, activities, materials. A primary criteria should be that the resource is basically free or available to employees in the workplace, are used as handouts as part of the counseling process or are available somewhere in the community.

People

1.
2.
3.

Activities

1.
2.
3.

Materials

1.
2.
3.

When you have finished the REVIEW activities, discuss your conclusions with at least one other trainee. Solicit comments on your understanding and application of the concepts.

ACTIVITY:

Use the Resource Evaluation Form on the following page to record information about each resource you listed. This information will help you evaluate the appropriateness and feasibility of each resource.

When you have recorded complete information about each resource on the Resource Evaluation Form, select the ones you would like to use. List those resources on the page titled "Available Resources," which follows the Resource Evaluation Form.

CHECKLIST: Do you have the following:

- o A list of resources to use in helping employees to develop learning, work maturity, and job search skills.

# RESOURCE EVALUATION FORM

Type of Resource ______________________________

Name of Resource ______________________________

Location of Resource:

Where to contact ______________________________

Where to attend ______________________________

Where to obtain ______________________________

Cost:

Purchasing cost ______________________________

Personnel cost ______________________________

Facilities and equipment cost ______________________

Reproduction cost ____________________________

Registration cost ____________________________

Travel cost ______________________________

Primary Use of Resource:

Resource Users:

Guidance personnel ____________________________

Clients ______________________________

Time Required to Use Resource:

Actual guidance and training time ________________

Independent study time ________________________

Advantage of this Resource:

Disadvantage of this Resource:

Decision:

I will _____ will not _____ use this resource because...

# AVAILABLE RESOURCES FORM

## INDIVIDUALS:

| Name | Title | Address | Contribution |
|---|---|---|---|

## ACTIVITIES:

| Title | Cost | Location | Date/Description of Services |
|---|---|---|---|

## MATERIALS:

| Title | Cost | Place Available | Description |
|---|---|---|---|

# OVERVIEW

---

COMPETENCY #3 — Prepare plans for conducting workshops on study skills, work maturity skills, job search skills, and skills in selecting an educational institution/program.

---

A half-day or one-day workshop is an effective way to engage employees in employability skill development. In delivering such skill development through a workshop format, it is important to communicate the goals and objectives of the workshop and the activities you will use to help participants achieve the desired program outcomes. Program goals should be stated in broad, general terms. They should answer the questions: (1) What should employees be able to do as a result of their involvement in the workshop? and (2) What will you, the counselor, do to help employees achieve the desired outcomes. The objectives should specify the behaviors employees need to demonstrate in order to achieve the workshop goals. The employee (learner) objectives should state the following:

- Employees to be involved in the program
- Expected behavior or outcome of employees
- Conditions under which performance is to occur (The conditions include procedures, materials, and strategies for assisting employees in learning and performing the expected behaviors.)
- Criteria (or measures) for judging employee successful performance

In providing employability skill training workshops, it is crucial that participants understand the instructional methods, content, goals and objectives, and outcomes to be expected through participation. The counselor can facilitate the employee's skill development by providing in the workshop...

- A set of guidelines and instructional materials to make available to the employees participants;
- a table where participants can use/review directories, guides, pamphlets, and other written materials about educational programs or curriculum;
- A list of education and training programs offered in the community and the names of representatives the employees can contact to learn about such programs;
- Encouragement for participants to visit organizations or institutions that are service providers and speak with the staff.

The following counseling techniques offer effectives means of helping employees during their skill development. The selection of most suitable techniques must be made by the individual counselor for the specific population to be served.

Group Counseling Techniques

Lecture
Group discussion
Role playing
Simulation
Audio visuals

In making plans about which techniques to draw upon, the counselor should consider the interest level of clients. Diverse workshop instructional methods which enhance participant attention and interest.

Group Counseling Techniques

- are less costly because several employees can be served simultaneously;
- offer the benefits of peer interaction as participants can learn from each others' experiences and are often more receptive to suggestions from peers than from others;

- contributes to ongoing assessment as individual problems surface in the group process.

Individual Counseling Techniques

- can be specifically tailored to the employee's needs,
- can be provided at the proper time to be relevant and perhaps avert crisis.

## A Workshop Plan for Employability Skills Development.

---

OBJECTIVE: Identify the program goals, objectives and implementation strategies for assisting employees in employability skill development.

REVIEW: Outline a tentative plan for providing employability skill development workshops

ACTIVITY: Prepare a final workshop plan incorporating lecture, discussion, role playing, simulation, speakers, and audio visuals for each of 4 employability skills.

CHECKLIST: You should have the following:

- o A workshop plan for providing employability skill development training.

REVIEW:

Review the information presented in the OVERVIEW. Then, assemble the resource list you compiled for Competency #2.

Using the information you have read and/or assembled, begin developing some ideas on the way you might structure a 1 hour to 1 day topic specific workshop for a group of employees who have expressed a common need for training. Indicate the amount of time you might devote to each Indicated Technique, how you might sequence various methods and the kinds of resources you might use (people, materials, audiovisuals, etc.).

---

Suggested Topic for Workshop

| Technique To Use | Content To Cover | Time Allocation | Resources To Be Used |
|---|---|---|---|

Technique Suggestions: (1) Lecture, (2) Group Discussion, (3) Individual Activity, (4) Role Playing, (5) Simulation, (6) Speakers, and (7) Audio visuals.

When you have completed the REVIEW activities, discuss your conclusions with at least one other trainee. Solicit comments on your understanding and application of the concepts.

ACTIVITY

Now that you have thought through your workshop plan, ask other trainees to review these part of your plan and give you feedback.

- Program goals
- Program objectives
- Workshop techniques

- Resources
- Timelines
- Outside services
- Evaluation

Assemble with other trainees and as a group discuss and decide what should be the key components of a workshop plan. After you have exchanged ideas and made your decisions, look at the sample worksheet plan on the next page, then prepare a plan for each of the following skill areas using the sample as a guide. (Use information in appendices K, M, N, and O as a resource.)

Study Skills
School Selection Skills
Work Maturity Skills
Job Search Skills

NOTE: The Sample Lesson Plan that follows might be useful in structuring a plan.

CHECKLIST: Do you have the following:

- A detailed plan for assisting employees in their employability skill development

## SAMPLE LESSON PLAN

Title:

Lesson Goal:

Lesson Objective(s):

Time Requirement:

Description of Activity:

Resources:

    Materials:

    People:

    Space/Equipment:

Evaluation:

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## STUDY SKILLS WORKSHOP

| Techniques | Activities | Time | Materials |
|---|---|---|---|
| Lecture | Workshop goals and objectives | 15 min. | Workshop agenda |
| Lecture | Present guidelines for study | 10 min. | Guidelines for study, appendix K |
| Individual Activity | Have participants read an article (topic related to their occupation/ organization, e.g., construction work) using study skill guidelines | 15 min. | Relevant Article |
| Group Discussion | Have participant discuss the main idea, keypoints, and questions of the activity | 50 min. | Guidelines for study, appendix K |
| Break | | 15 min. | |
| Speaker | Invite an instructor from a local school to speak on the topic of study skills Allow time for questions and answers | 1 hr. 15 min. | Optional |
| Lunch | | 1 hr. | |
| Group Discussion | Study skills as presented by speaker (summary) | 15 min. | None |
| Individual Activity | Have participants read second article, take notes, etc. | 30 min. | Relevant article, Study Skill guidelines, appendix K |

| | | | |
|---|---|---|---|
| Small Groups | Have participants assemble in small groups to discuss distractions to study (noise, poor lighting, reading level of materials, fatigue, etc. | 30 min. | None |
| Break | | 15 min. | |
| Small Group | Report on the discussion of distracting and obtain recommendation for coping with distractions | 20 min. | |
| Lecture | Report on educational institutions and course offerings on study skill | 15 min. | School Catalogues/ Brochures |
| Individual | Have participants brouse through the printed material assembled on the table | 30 min. | Relevant school catalogues, etc. |
| Group | Question and answer period | 15 min. | |
| Individual | Evaluater of workshop | 15 min. | Evaluate materials |

# OVERVIEW

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COMPETENCY #4: **Prepare and/or select a formk to use in obtaining evaluation of the employee skill development workshop.**

---

A simple participant evaluation of each workshop will give you insights into the instructional strengths and weaknesses. Typically, pre- and post- self-assessments provide sufficient and targeted feedback enabling the counselor/trainer to better perfect the workshop content and design.

Realizing that trainers each will have different interests and time constraints that will affect the kind of evaluation techniques they'll use, the following appendices will provide some ideas for possible use.

Appendix G, Participant Self-Assessment Questionnaire

Purpose: If time permits you could collect self-appraisals of the employees regarding what they think their knowledge is concerning the content you'll cover (competencies). This could be useful in customizing the workshop for a particular group. Likewise, when the workshop is over you could pass out copies of their pre-test and again have them rate their knowledge or competence. This will give you subjective but good indicators of workshop success.

Appendix H, Trainers Assessment Questionnaire

In general this form is to help the trainer record all background information on each workshop group. Secondly, it's a way of keeping track of what you used and how you conducted the training for future improvements.

Part I. Helps the trainer record what they actually did during the workshop.

Part II. Provides a simple way of judging grouip performance.

Part III. Provides a way of developing group summary performance.

Appendix I, Performance Indicators

Any trainer should know generally what indications would allow them to consider the training to be going well. This form could help the trainer, in advance of the workshop, to generate some specific indicators for any group activity. During the workshop the trainer can refer to these and then use Part II of the Appendix R to rate the event.

## Follow Up: Learning about Employees' Progress

---

**OBJECTIVE:** List the content topics to include in a participant and a workshop evaluation.

**REVIEW:** Discuss the sample forms in Appendices P, Q, R and S, and note the key points that might be useful to you as a counselor trainer.

**ACTIVITY:** Prepare two forms to use in evaluating the workshop--participant evaluation and workshop/trainer evaluation.

**CHECKLIST:** Do you have the following:

- o A participant evaluation form
- o Workshop/trainer evaluation forms

---

REVIEW:

Read the forms in Appendices Q, R, and S. Discuss with other trainees the topics that should be included in an employee training evaluation.

1.

2.

3.

4.

5.

ACTIVITY

Have the large group assemble their review notes on Appendix Q, R, and S. Lead an informal discussion about the basic principles of evaluating such a workshop. The small groups will also need to use the various handouts on the topic earlier in the module.

As a resultof the small group sessions have each report how they used the form or describe any new approach they developed.

CHECKLIST: Do you have the following:

- A detailed follow up plan for assessing employee progress in employability skill development

## APPENDIX A

## Guidelines for Study Skills

### Study Preparation

1. Select a given time to allot for study.
2. Choose a quiet, well-lit study environment.
3. Assemble study materials and texts.

### Study

1. Review the instructions for the assignment.
2. Read about one topic at a time.
3. Stop periodically and mentally summarize what you have read.
4. Take notes, listing . . .
    - o the main idea and key points to remember, and
    - o questions you have that you can later ask you instructor.
5. Use the dictionary to learn the definitions of unfamiliar words.
6. Recognize the topic of the next information to study.
7. Read about the next topic.

APPENDIX B

# Job Search Skills Competency Record

Name____________________________

## Prepare for the Job Search

**Choose a Job and Prepare for Employment**

☐ Determine the Jobs for Which You Are Qualified
☐ Define the Hiring Practices for the Job
☐ Meet the Hiring Requirements

**Compile Information for Applications and Resumes**

☐ Record Personal Data
☐ State Your Career Objective
☐ List Your Formal Education and Training
☐ List Special Skills
☐ List Your Work Experiences
☐ List Volunteer Experiences
☐ List Special Credits and Activities
☐ List References

**Prepare the Resume**

☐ Choose a Type of Resume to Prepare
☐ Prepare a Draft Copy of the Resume
☐ Prepare the Final Copy of Your Resume

## Search for Available Jobs

**Identify Potential Employers**

☐ Compile a List of Job Leads
☐ Gather Facts about Job Leads

**Decide Which Employers to Contact First**

☐ Relate Personal Skills to Job Leads
☐ Relate Personal References to Job Leads

**Follow Job Leads**

☐ Prepare Your Message
☐ Contact Employers Directly by Telephone
☐ Contact Employers in Person

## Apply for Jobs

**Fill Out Applications**

☐ Anticipate Questions
☐ Record Information Neatly, Clearly, Completely, and Correctly

**Present the Application**

☐ Find Out Relevant Facts
☐ Seek an Appointment for an Interview

## Interview for the Jobs

**Prepare for the Interview**

☐ Make the Appointment
☐ Make Arrangements to Get to the Interview
☐ Anticipate Interview Questions
☐ Prepare Your Physical Appearance
☐ Take Necessary Materials
☐ Be Punctual

**Handle the Interview**

☐ Handle the Introduction in a Positive Way
☐ Communicate Effectively with the Interviewer
☐ Ask Questions about the Job and Company
☐ Complete the Interview

**Follow Up on the Interview**

☐ Evaluate and Improve Your Interview Techniques
☐ Write a Thank-You Letter to the Interviewer
☐ Place Follow-Up Telephone Calls to the Interviewer

## Handle Job Offers

**Find Out Information about the Job and Company**

☐ Identify Specific Items in the Job Offer
☐ Find Out the Company's Policies and Procedures

**Negotiate for the Job**

☐ Determine if the Job Offer Meets Your Personal Needs
☐ Make a Choice

**The Employer's Choice: The Job Search**

# GUIDELINES FOR COMPLETING AN APPLICATION

## PART A

Know the information you will be asked to provide on the job application. You may know some of the information from memory. Other information you will have to look up in records, phone books, and so forth. As you read each item below, write the appropriate information on a separate sheet of paper. Take this paper with you when you go to apply for a job. Refer to it as you fill out the application. Then you will be sure the information you give is accurate.

**Record personal data.**

- Print your name in upper/lower case. Print your name in the order requested on the application.
- Print your Social Security number. Copy the number from your Social Security card or from your driver's license. If you don't have a number, apply for one at the Social Security office in your town.
- Print your current address, including city, state, zip code, county, and township. Record how long you have lived at this address.
- Print the telephone numbers where you can be reached. Include the area code.
- If you cannot check "Yes" for U.S. citizen, print your visa number and the type of visa you have.

**Record information about your education and schooling.**

- List the names and addresses of schools you have attended.
- List the dates you have attended each school, the courses of study, the grades completed, and the diploma given.
- If you have received a GED, list the date received. Also list the school or institution from which you received the certificate.

**Record information about your work experience.**

- List the names of past employers and the dates of employment. (Also list a current employer if you are now working part-time.)
- List the job responsibilities you have had in each job. Also list the equipment you have used and any training you received.
- List any volunteer jobs in the same way you would list paid work experience. List your position, the hours you worked, the dates you worked, responsibilities, equipment you used, and any training you received.
- This is a good place to list your skills. List the skills you brought to each job. Also list other skills you have acquired while on the job.

**Answer questions positively.**

- Give positive reasons for leaving a previous job. Do not give negative responses such as the following:

  —The boss didn't like me.
  —I quit.
  —I didn't think the pay was high enough.
  —I didn't like the other workers.
  —I was sent to jail.
  —I was injured at work.
  —I was fired.
  —I was bored with the work.

  Instead, use the following kinds of positive responses.

  —I wanted more responsibility.
  —I became a full-time student.
  —I became interested in another type of work.
  —I enrolled in a training program.
  —I started my own business.
  —I left to take care of my ailing father.
  —I moved out of the city.
  —I wanted more opportunities for advancement.

- Don't consider common ailments when answering questions about health. Most people have colds, flu, aches, and pains some time in life. Employers want to know if you can do the job. Write that your health is excellent if you have nothing seriously wrong with you.

**List good references.**

- Choose former employers, teachers, and business people who know you and who will say good things about you. Don't list relatives.
- Choose people who can be easily contacted. Employers may need to contact these people quickly.
- Ask the people you want to list as references if you may do so. Tell them when they might expect calls from employers.
- List the names, addresses, telephone numbers, and possibly the company names of your references.

## The Employer's Choice: The Job Search

## PART B

Record all information in a neat, concise, complete, and correct manner. Follow the guidelines given below.

**Read the instructions carefully.**

- Watch for the words "Do not write in this space." Make sure you follow the direction.
- Ask questions if you do not understand an instruction.

**Write in a neat, legible manner.**

- Erase carefully.
- Print if directed to do so or if your handwriting is poor.

**Spell correctly.**

- Find out how to spell words you will need to use before you go to apply for the job. Make sure you know the spelling of technical terms related to the job you are seeking.
- If you are unsure of a spelling when you are in the employer's office, use a word you know how to spell.

**Fill in the application completely.**

- If a question is one you cannot answer, write N/A (for not applicable) in the blank. Or draw a dash in the answer space to show you have seen the question.

**Be honest but don't volunteer too much information.**

- Do not mention disabilities on the application, unless the disability could interfere with your ability to do the job. However, you can and should mention any disabilities in the interview.
- If you have a criminal conviction, you can do the following:
  - —Leave the space blank if the crime was minor. This information is hard for employers to get. It must be released by you.
  - —Leave the space blank if you have been convicted of a felony (major crime). Discuss the topic in the interview. If the application states that you *must* mention the conviction, do so.

**Review your completed application.**

- Make sure the information you have recorded is accurate.
- If you made a mistake and cannot correct it neatly, ask for a second application.

# GUIDELINES FOR INTERVIEWING

**Arrive at the interview prepared and on time.**

- Find out the date and time of the interview.
- Find out the name of the interviewer and the office where you will be interviewed.
- Find out where you should park if you will be driving to the interview.
- Have enough gas in your car if you will be driving.
- Know the bus schedule if you will be taking the bus.
- Allow extra time for dressing, walking, traffic, and weather.
- Arrive at the interview early so you will have a chance to calm yourself before you meet the interviewer.
- Call to inform the interviewer if you are delayed or ill.
- Take along a resume if you did not attach one to your application.
- Take along your competency list or profile if you have one. If you do not have such a list, ask your instructor to help you assemble one.
- Take samples of your work with you, if possible. For example, if you are a graphic designer, you might take along some of your best sketches or other work to show the interviewer.

**Present a positive appearance.**

- Make sure you are clean and well-groomed. Shower and shave; use deodorant; clean your fingernails; wash, comb, and style hair; use limited amounts of makeup; use perfume or after-shave lotion sparingly; brush teeth.
- Get an adequate amount of sleep the night before the interview.
- Know the dress requirements for the job. For example, learn if suits are the only acceptable attire. Select attire that shows your respect for the interviewer and the firm. Your clothes should indicate that you are responsible. Avoid flashy or trendy clothes. They give a "play" rather than "business" focus. Conservative clothes are more appropriate.
- Make sure your clothes are clean and well pressed.
- Make sure your clothes are the correct length and size. Avoid clothes that are too tight, short, or revealing.

## The Employer's Choice: The Job Search

**Use proper language.**

- Use proper terminology. Know and use job-related terms.
- Use correct grammar.
- Use proper vocabulary. Avoid using slang (such as tough, cool) and offensive words (such as stupid, dumb, mean).
- Speak clearly, pronouncing words carefully.

**Use proper nonverbal communication.**

- Stand erect and shake the interviewer's hand in greeting. This will convey self-confidence.
- Give full attention to the interviewer. Look at the interviewer and listen carefully to what is being said.
- Avoid such habits as chewing gum, smoking, biting nails, and so forth.
- Show enthusiasm through facial expressions as well as through tone of voice.
- Use good posture to show interest and involvement.

**Communicate a positive attitude.**

- Answer all questions in a positive manner. (See suggestions on the last page of these guidelines).
- Be direct and honest in what you say.
- Speak courteously and respectfully.
- Avoid saying anything that is or appears to be negative, particularly about previous employers or teachers.
- Vary expression in your voice and face to show interest and enthusiasm.
- Let the employer know you are aware that a beginner's tasks are sometimes routine.

**Show interest in the job.**

- Ask about the job tasks and hours of work.
- Ask about opportunities for promotion.

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## The Employer's Choice: The Job Search

**Answer questions correctly, completely, and intelligently.**

The following are some of the questions employers ask applicants. Read the questions and the recommendations for answering them.

- What can you tell me about yourself?

  This question is asked to find out about your skills. It is the perfect time for you to "sell" yourself. Tell about your interests, abilities, skills, education, and experiences. Explain how you will be a benefit to the company.

- Why do you want this job?

  Explain what you hope to do *in this company* and *in this job*. Explain how you hope to use your interests, abilities, skills, education, and experiences. Explain other goals. Do you hope to become a supervisor? Do you hope to learn new skills and techniques?

- Why do you want to work for this company?

  Think about the facts you learned about the company. Or go to the library. Find more facts in the newspaper files. Get company pamphlets, brochures, reports, etc. Read them before you apply for the job. Talk with company employees that you know.

  State some good points about the company. Tell where you learned your facts.

- Why should we hire you?

  Relate this answer to answers from questions one and two.

  Tell about any records of your skills. Show the interviewer a record of your competencies if you have one. Tell what you have learned through your experiences. Tell some of your work maturity skills. Give examples to show you are . . .

  —dependable
  —diligent
  —willing to learn
  —honest
  —reliable
  —thorough
  —enthusiastic
  —loyal
  —cooperative
  —considerate of others
  —respectful
  —responsible

- What is your greatest strength?

  Mention a skill you have that is needed in the job. State how this skill will help you to do a good job.

- What is your greatest weakness?

  This question asks you to mention a *current* weakness. Remember to be positive. Present a weakness as a good point. For example, say . . .

  > "My weakness is that I'm too diligent. Sometimes I must work overtime to make sure a job is done the right way."

This statement shows that you care about your work, you have high standards, and you are willing to work overtime to see that a job is done well. (It is another way of saying you sometimes fall behind schedule, but it gives a good reason for why you do so.)

- What jobs have you had?

Refer to your resume. Describe the knowledge and skills you acquired in each job. Remember that employers are most interested in the kinds of activities or job duties held. For example, tell the interviewer that your work at a local fast-food restaurant helped you develop skills to deal with customers and to be productive.

- What is your training and education?

Refer to your resume. State your training and education. Explain how it has prepared you for the job.

- What are your hobbies?

Mention several of your hobbies. Explain that they are just some of the ways you spend your free time. Mention your volunteer activities. Mention any community activities. Mention educational activities, such as book groups or continuing education courses.

- Do you plan to return to school?

Answer this question *only* as it relates to the job for which you are interviewing. Do you think you may want to take evening courses to upgrade your skills? Say so. Would you consider taking a training program? Say so. Let the interviewer know you want to do the best job possible for this company. Let him or her know you are willing to work to improve your knowledge and skills.

- Why did you leave your last job?

If you left to continue your education, say so. If you left to become self-employed, say so. But if you left because of problems on the job, explain.

Explain why you were not suited for the job. Explain what you learned from the experience. Give names of other jobs (and employers) that were good experiences for you. Suggest the interviewer call them for references.

- Why do you show gaps in your employment?

Explain planned gaps. For example . . .

> "I returned to school full time," or
> "I became self-employed."

Explain other gaps by saying . . .

> "I was exploring various occupations. I was unsure of my career path. Now I know the type of job for which I am best suited. I am looking forward to pursuing that work."

## The Employer's Choice: The Job Search

- Do you work well with others? How did you relate to your supervisors?

  Again, describe some of your work maturity skills. Give examples.

- How do you feel about working overtime?

  State your enthusiasm about the job. Show willingness to work overtime when necessary. If you will need advance notice to work overtime, say so. Explain why (for example, you may hope to ride in a car pool).

- Do you have any serious injuries or illnesses?

  Be honest about serious illnesses. Mention the illness. Mention any limitations you will have For example . . .

  Illness: rheumatic fever
  Limitation: "I can't lift anything that weighs over 40 lbs."

  Mention why you feel the limitation will not affect the way you do the job. Mention how the illness has not affected other work you have done. You could say, for example . . .

  > "I don't expect this to be a problem. Secretaries are rarely asked to do heavy lifting. If I am, I'm sure I can trade tasks with another worker. Maybe I could go to the mail room if another person could lift a box for me."

  Or explain steps you have taken to adapt to the illness or injury.

  Injury: slipped disc

  > "I used to be a stock clerk. After my back trouble, I had to prepare for another type of work. That is why I studied and trained to become a bookkeeper. There is little heavy lifting required of bookkeepers."

- Do you have any disabilities?

  Be honest about obvious disabilities. Mention them. Give examples of how they have not affected your work. Explain why you expect to perform well in this job.

- Have you ever been arrested or sent to jail?

  Be honest about these facts. They are easy to trace. However, always be positive. Point out the lesson you have learned through these experiences. Explain your goal to begin a new life pattern. Explain how this job is one step toward that goal.

- What salary do you expect?

  Mention your knowledge of the general salary range for this job. Explain that you expect a reasonable salary. But explain that opportunities for promotion and raises are equally important to you.

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This material was taken from the Technical Assistance for Occupational Skills Training Project, *Job Search Skills*, sponsored by the Office of Youth Programs, U.S. Department of Labor. Columbus, Ohio: The National Center for Research in Vocational Education, 1981.

APPENDIX E

# Work Maturity Skills Competency Record

Name ____________________

### Present a Positive Image

**Follow Good Grooming Practices**

- ☐ Maintain Cleanliness
- ☐ Practice Dental Hygiene

**Practice Good Health Habits**

- ☐ Follow Good Nutrition and Diet Principles
- ☐ Follow Habits That Promote Physical Fitness

**Dress Appropriately for the Job**

- ☐ Select Appropriate Work Clothing
- ☐ Keep Clothing in Good Condition

**Exhibit Self-Confidence**

- ☐ Identify Personal Strengths
- ☐ Use Positive Body Language

### Exhibit Positive Work Attitudes

**Use Basic Social Skills**

- ☐ Assume Positive Behavior
- ☐ Exhibit Interest to Others

**Be Creative and Willing to Learn**

- ☐ Identify Creative Potential in Yourself and Others
- ☐ Seek New Ideas and Ways of Doing Things

**Take Pride in Your Work**

- ☐ Develop a Sense of Contribution about Your Work
- ☐ Be Particular about the Finished Product

### Practice Good Work Habits

**Maintain Regular Attendance**

- ☐ Be Punctual
- ☐ Be Dependable

**Be Thorough and Diligent**

- ☐ Complete Tasks Willingly and on Time
- ☐ Be Persistent and Persevering
- ☐ Maintain Professional Knowledge

**Follow Safety Practices**

- ☐ Identify and Follow General Safety Rules
- ☐ Operate Equipment Safely
- ☐ Identify and Demonstrate First-Aid Techniques

### Practice Ethical Behavior

**Exercise Integrity and Good Judgment**

- ☐ Maintain Confidentiality
- ☐ Maintain Loyalty
- ☐ Demonstrate Honesty

**Respect Property**

- ☐ Care for the Building
- ☐ Care for Equipment and Furniture

**Follow Company Rules**

- ☐ Follow Company Policies and Operating Procedures
- ☐ Negotiate to Resolve Conflicts

### Communicate Effectively

**Demonstrate Spoken Communication Skills**

- ☐ Use Proper Language
- ☐ Use Proper Speaking Techniques
- ☐ Correctly Relate Information and Messages

**Demonstrate Written Communication Skills**

- ☐ State Information in a Clear, Concise, and Correct Manner
- ☐ Convey Accurate and Complete Information

**Demonstrate Nonverbal Communication Skills**

- ☐ Use Body Language to Improve Speaking Skills
- ☐ Use Body Language to Improve Listening Skills

**Demonstrate Good Listening Habits**

- ☐ Exhibit the Qualities of a Good Listener
- ☐ Follow Verbal Instructions

### Accept Responsibility

**Use Initiative**

- ☐ Anticipate Responsibilities on the Job
- ☐ Be Willing to Perform Your Scope of Work

**Use Problem-Solving Techniques**

- ☐ Analyze the Problem
- ☐ Identify and Choose among Alternatives
- ☐ Devise a Plan of Action

**Manage Personal Responsibilities**

- ☐ Manage Responsibilities of Family Lving
- ☐ Manage Personal Finances

### Cooperate with Others

**Work as a Member of a Team**

- ☐ Communicate Freely with Co-Workers and Supervisors
- ☐ Deal with Job Frustrations

**Work under Supervision**

- ☐ Identify and Work within the Organizational
- ☐ Structure
- ☐ Cope with Conflict

## APPENDIX F

Guidelines to Choose A School/Institution

1. Determine your objective. Are you planning to learn a new skill or ungrade an existing skill? What skills do you want to acquire and/or improve? What courses do you want to take?

2. Obtain recommendations for schools/courses. Ask friends, acquaintences, and other employees how they rate the schools you are considering. Learn who has taken the courses you want to take and get their opinions of the courses and instructors.

3. Write, telephone, and/or visit the schools recommended to you. Ask for copies of course catalogs and any other information made available by the school.

4. Study the catalogs. Decide if the courses will help you reach your career objective.

5. Ask for references. Request from a school administrator, the names and phone numbers of recent graduates whom you could contact for information.

6. Contact employers who have hired graduates of the school. Ask for their opinions of those employees' skills and if they would hire graduates of the school.

7. Learn the school's reputation in the community. The local Better Business Bureau or the state department of public instruction can provide such information.

8. If you are a veteran, check with the Veterans Administration office.

9. Read and understand the school's contract before you sign it.

10. Finally, decide if you have the determination and will power to devote the time and effort required for coursework.

11. If you decide to register, read the admissions contract to learn

    - the cost of tuition
    - the payment periods

12. Obtain information about financial aid and scholarships.

Appendix G

# EVALUATION

## PARTICIPANT SELF-ASSESSMENT QUESTIONNAIRE

1 Name (Optional) ____________________ 3 Date ____________________

2 Position Title ____________________ 4 Module Number ____________________

**Agency Setting** (Circle the appropriate number)

6 Elementary School
7 Secondary School
8 Postsecondary School
9 College/University
10 JTPA
11 Veterans
12 Church
13 Corrections
14 Youth Services
15 Business/Industry Management
16 Business/Industry Labor
17 Parent Group
18 Municipal Office
19 Service Organization
20 State Government
21 Other

| **Workshop Topics** | PREWORKSHOP NEED FOR TRAINING *Degree of Need* (circle one for each workshop topic) | | | | | POSTWORKSHOP MASTERY OF TOPICS *Degree of Mastery* (circle one for each workshop topic) | | | | |
|---|---|---|---|---|---|---|---|---|---|---|
| | None | Slight | Some | Much | Very Much | Not Taught | Little | Some | Good | Outstanding |
| 1 | 0 | 1 | 2 | 3 | 4 | 0 | 1 | 2 | 3 | 4 |
| 2 | 0 | 1 | 2 | 3 | 4 | 0 | 1 | 2 | 3 | 4 |
| 3 | 0 | 1 | 2 | 3 | 4 | 0 | 1 | 2 | 3 | 4 |
| 4 | 0 | 1 | 2 | 3 | 4 | 0 | 1 | 2 | 3 | 4 |
| 5 | 0 | 1 | 2 | 3 | 4 | 0 | 1 | 2 | 3 | 4 |
| 6 | 0 | 1 | 2 | 3 | 4 | 0 | 1 | 2 | 3 | 4 |

**Overall Assessment on Topic of**

**Comments:** ____________________

Appendix H

# Trainer's Assessment Questionnaire

Trainer: ____________ Date ____________ Module Number: ____________

Title of Module: ________________________________

Training Time to Complete Workshop: ____________ hrs. ____________ min.

*Participant Characteristics*

Number in Group ________ Number of Males ________ Number of Females ________

*Distribution by Position*

________ Postsecondary School
________ College/University
________ JTPA
________ Veterans
________ Church
________ Corrections

________ Youth Services
________ Business/Industry Management
________ Business/Industry Labor
________ Parent Group
________ Municipal Office
________ Service Organization
________ State Government
________ Other

## PART I

**WORKSHOP CHARACTERISTICS—Instructions:** Please provide any comments on the methods and materials used, both those contained in the module and others that are not listed. Also provide any comments concerning your overall reaction to the materials, learners' participations or any other positive or negative factors that could have affected the achievement of the module's purpose.

1. *Methods:* (Compare to those suggested in Facilitator's Outline)

2. *Materials:* (Compare to those suggested in Facilitator's Outline)

3. *Reaction:* (Participant reaction to content and activities)

## PART II

**WORKSHOP IMPACT—Instructions:** Use Performance Indicators to judge degree of mastery. (Complete responses for all activities. Those that you did not teach would receive 0.)

**Group's Degree of Mastery**

**Note: Circle the number that best reflects your opinion of group mastery.**

|  | Not Taught | Little (25% or less) | Some (26%-50%) | Good (51%-75%) | Outstanding (over 75%) |
|---|---|---|---|---|---|
| **Learning Experience 1** |  |  |  |  |  |
| Group | 0 | 1 | 2 | 3 | 4 |
| Individual | 0 | 1 | 2 | 3 | 4 |
| **Learning Experience 2** |  |  |  |  |  |
| Group | 0 | 1 | 2 | 3 | 4 |
| Individual | 0 | 1 | 2 | 3 | 4 |
| **Learning Experience 3** |  |  |  |  |  |
| Group | 0 | 1 | 2 | 3 | 4 |
| Individual | 0 | 1 | 2 | 3 | 4 |

**Code:**

**Little:** With no concern for time or circumstances within training setting if it appears that less than 25% of the learners achieved what was intended to be achieved

**Some:** With no concern for time or circumstances within the training setting if it appears that less than close to half of the learners achieved the learning experience

**Good:** With no concern for time or circumstances within the training setting if it appears that 50%-75% have achieved as expected

**Outstanding:** If more than 75% of learners mastered the content as expected

## PART III

**SUMMARY DATA SHEET—Instructions:** In order to gain an overall idea as to mastery impact achieved across the Learning Experiences taught, complete the following tabulation. Transfer the number for the degree of mastery on each Learning Experience (i.e., group and individual) from the Workshop Impact form to the columns below. Add the subtotals to obtain your total module score.

| **GROUP** | | **INDIVIDUAL** | |
|---|---|---|---|
| Learning Experience | | Learning Experience | |
| 1 = score (1-4) | ________ | 1 = score (1-4) | ________ |
| 2 = score (1-4) | ________ | 2 = score (1-4) | ________ |
| 3 = score (1-4) | ________ | 3 = score (1-4) | ________ |
| Total | ________ | Total | ________ |
| (add up) | | (add up) | |

Total of the GROUP learning experience scores and INDIVIDUAL learning experience scores = ________. Actual Total Score ________ Compared to Maximum Total* ________.

*Maximum total is the number of learning experiences taught times four (4).

Appendix I

# Performance Indicators

As you conduct the workshop component of this training module, the facilitator's outline will suggest individual or group activities which require written or oral responses. The following list of **performance indicators** will assist you in assessing the quality of the participants' work:

Module Title:

Module Number:

| Group Learning Activity | Performance Indicators to Be Used for Learner Assessment |
|---|---|
| Group Activity Number 1: | 1. Participants can list<br>2. Participants have completed and reviewed a<br>3 Participants have completed and reviewed a |
| Group Activity Number 2: | 1. Participants can list steps<br>2. Participants have completed |

## Client, Employer, and Educational Agency Evaluation System

| | Goal |
|---|---|
| PREPARE SUPERVISORS AND CAREER GUIDANCE SPECIALIST TO ASSESS SERVICES | After completing this module the counselor will be able to assess the program impact on clients and their subsequent use of information about re-training options. |

---

| | |
|---|---|
| Competency #1: | Evaluating this employee assistance program element that focuses on job re-training. |
| Competency #2: | Use client evaluation materials to determine what they have learned from the career assessment, counseling, and planning process. |
| Competency #3: | Follow-up of employees with educational and occupational training agencies to determine what they did in seeking and acquiring training. |

---

It is expected that HRD and career counselors view career decision making as a skill that can be developed and improved through learning, self-awareness and practice. Employees who decide not to implement career or job changes may lose the opportunity to make significant changes in their lives.

The standard format used in this and other modules for this program is as follows:

- o About This Module: This section presents (1) the goal--a statement of what one should be able to accomplish by completing the module, and (2) an outline of the competencies thought to be most critical to achieving the goal.
- o Overview. The overview offers an introduction to the topic and describes the purpose and content of the competency to be addressed.
- o Learning Experiences: Each learning experience is designed to help users develop a specific competency. Within this section of the module are the following components:

Objective: This statement describes the skills the trainee must be able to demonstrate at the conclusion of the learning experience.

Review: This section includes individual exercises the trainees complete to demonstrate understanding of the competency. It also provides opportunities for immediate feedback regarding their understanding and progress.

Activity: The activity is designed to engage the trainee in performing the tasks for which the competency is required. The suggested activities involve a blend of development, presentation, and "hands-on" participant activities, such as games and role playing.

Checklist: The checklist is merely an itemized list of materials the trainee should have developed, acquired, and assembled through the learning experience.

- Evaluation: This section of each module contains information and instruments that can be used to measure what workshop participants need prior to training and what they have accomplished as a result of training. Included in this section are a Pre- and Post-Participant Assessment Questionnaire and a Trainer's Assessment Questionnaire.

- References. All major sources that were used to develop the module are listed in this section. Also, major materials resources that relate to the competencies presented in the module are described and characterized.

# OVERVIEW

## Client, Employer and Educational Agency Evaluation

---

| | |
|---|---|
| COMPETENCY #1 | Evaluating employee assistance programs that focus on job retraining. |

---

This module is designed to assist HRD and career counselors in assessing the impact of services they provide in a company's employee assistance programs. Any program of services provided to employees must deal with the changing cyclical process of life. Adults progress through a series of discreet stages ranging from career establishment, maintenance and subsequent decline. In establishing career paths for already employed employees it is wise to be cognizant of initial recruitment efforts that hired the person.

A critical implication for determining success of the training and assessment process is related to initial recruitment practices. Has the employee demonstrated various levels of increasing responsibility in different jobs or assignments within the corporation? Are we providing career guidance services to employees with potential for change, adaptation and success in training programs?

For the purposes of this guide module, support (or supportive) services are defined as those services that enable persons to overcome barriers to productive employment. Typical support services that administrators, instructors, and counselors draw upon include health care, dependent care, transportation services, information services, training services, drug and other substance abuse services, interpretation services, financial planning services, and of course, job placement and follow-through services.

The point of view on which this guide is built is that employee assistance services often subsume many of the aforementioned services. Therefore, ultimately lead to improved jobs for employees and/or further education and training.

The following are the essence of the assessment, counseling and educational planning aspects of an employee assistance program:

- o Ensure that participants learn sufficient skills to get and keep a job.
- o Direct participants to internal job openings that correspond with their skills, qualifications, and interests.

- Give participants updated, realistic information about the future career ladder opportunities within their occupational field.
- Maintain an awareness of the multifaceted nature of participants' employment and training needs.
- Provide continued and consistent support for participant growth in job improvement and advancement skills.

OBJECTIVE: Assess the program impact on clients and their subsequent use of information about retraining options.

## Evaluation Defined

Evaluation of the clients process and the counselors effectiveness is a process of gathering program-related information from former participants and their employers. People assume different purposes for such a program so it is necessary to more narrowly define the purpose by applying concrete goals; that is, why evaluation is being carried out and what will be done with the results.

The goal of a client assessment, counseling and educational planning program is to enable their participants to become self-sufficient in the labor market by providing them with realistic and saleable job training and employment opportunities. It has been found, however, that this goal often is not achieved. Thousands of employees each year fail to obtain new or advanced jobs or enter other training programs for career advancement. Considering the prodigious amount of time, money, and energy that is invested in training program participants for employment, new methods of helping employees commit to retraining is needed.

Appendix A "Concepts and Evaluation Practices" adds details to help determine the requirements and effective methods to meet these requirements. Please read through these points for use in the following activities.

Activity #1: Review the following "Employee Career Plans Implementation" form. The purpose of the review is to determine the basic focus that should drive your evaluation. In small groups discuss each point and then adopt, adapt, or drop any one of the items. During the discussion other critical issues will surface so add those to the list. As a result of the activity each small group should share those that they kept stating rationale and identify those that were dropped or added with rationale.

Activity #2: Again in small groups, general ideas, concerns and suggestions on how this assessment, counseling, and education planning component should fit into the overall employee assistance program should be discussed. As a result of the small group each participant will have a list of questions that (a) they may want to share with the group for resolution or (b) keep until such time that they're contacted to work with a specific employer where their specific answers could be given. The following form (issues concerning program integration into EAP) that could be used as a recording device already has some issues tested. Fill out the form for large group discussions.

## Employee Career Plan Implementation

| | Yes | No | Uncertain | Rationale |
|---|---|---|---|---|
| 1. Employee has a career/ training plan? | | | | |
| 2. Employee has contacted an educational training facility? | | | | |
| 3. Employee has contacted a vocational training facility? | | | | |
| 4. Employee successfully completed the corporate training program? | | | | |
| 5. Employee has completed a vocational assessment program (testing, etc.) | | | | |
| 6. Employee is placed in a new job within the company? | | | | |
| 7. Employee transferred within the corporation? | | | | |
| 8. Employee left the corporation? Why? Where? | | | | |
| 9. Employee is still enrolled in the training program? | | | | |
| 10. Employee records are up-to-date | | | | |
| 11. ____________________ | | | | |

12. ____________________ ____ ____ __________ _____________
_____________
_____________

13. ____________________ ____ ____ __________ _____________
_____________
_____________

14. ____________________ ____ ____ __________ _____________
_____________
_____________

---

Note: The list is oriented to securing counselor opinions of employee status.

# ISSUES CONCERNING PROGRAM INTEGRATION INTO EAP

Questions

1. Do EAP specialists in the corporation already maintain accurate client records? Are they available? What's the procedures for use?

2. What services are already provided participants in the employee assistance programs? For example: individual assessment, aptitude/ability testing, career counseling, etc.? How do we fit into the existing process?

3. The information gathering process is used to ensure accurate up-to-date information on all participants? What information can we obtain on participants within corporate policy?

4. How do the goals and objectives of the existing employee assistance program fit into our tasks? How does what we wish to accomplish help the EAP achieve their objectives?

5. What procedures have been established to secure data on employee career decisions? Actions? Training? Placements? Are the existing procedures open for improvement?

6. Has the Employee Assistance Supervisor maintained close contact with postsecondary schools, colleges, job training programs, and special needs referral agencies? What resource bank already exists? What agreements are already in place? How do we work with the supervisor for our referrals?

7. What results appear to be accruing from the EAP's? Are a significant percentage of employees successfully completing training? Finding new job placements? Completing educational training programs? In general, where are the weak links in the existing program and how could we strengthen them?

8.

9.

10.

- o Elicit group ideas, suggestions, concerns in relation to EAP's.
- o Be prepared to discuss group reactions and recommendations to full group.

# OVERVIEW

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**COMPETENCY #2:** Use employee evaluation materials to determine what they have learned from the career counseling process to inform employers on positive results.

---

In this section we will describe employee actions taken to enhance their career development, i.e., new skills acquired and/or applied in the work setting. The objective is to describe and document employee behaviors acquired from the EAP for employer use in future planning.

Review:

In general, the ideal situation for employees is to identify the best career and education alternatives are available and then to carefully decide a plan of action to implement a change. The questions are what do participants in EAP's want to learn? How do they change their established career patterns? What are the consequences of decision A in relation to decision B? Do they profit from EAP's? For success, each participant must identify transferable, functional skills that have wide application in a variety of job opportunities within the corporation.

Activity:

Earlier discussions have centered around what to measure and how to measure employee success and movement through assessment, counseling, educational planning and skill development. In large groups discuss overall approaches that would be appealing to the employer that would form objective and believable impressions on your work and that of your clients.

| Ideas | Comments |
|---|---|
| 1. Reports of program effectiveness from independent experts. Maybe the employer has someone that would like to assist in certain aspects of program evaluation. | |
| 2. Performance ratings and learner outcomes ratings and learner outcomes of program graduates. | |

3. Placement of clients into job training, vocational education, or higher education settings. Evidence of educational program completion of graduates. Counselor could quarterly give a short progress report on clients assigned dealing with enrollments and completions.

4. Feedback reports on employee performance appraisal by supervisors, improved work speed, fewer rejects, fewer errors, work quality. Provide a simple time efficient way for supervisors to report and maybe even get the employee to self-report such progress.

5. Counseling service assessment reports on each client. Each client could be asked to fill out an exit evaluation form and results reported quarterly.

6. Performance tests of knowledge, skills, and abilities acquired in the EAP. It might be possible to show gain scores of earlier pre/post data is available.

7. Videotapes of employees in new work sites might be useful in some settings which demonstrates attitudes and performance.

8. Report any compiled evidence regarding improved or new:

    1. Planning skills
    2. Communicating (oral) skills
    3. Reading/writing skills
    4. Manual skills
    5. Detail/follow-through skills
    6. Numerical skills
    7. Influencing skills
    8. Performing skills
    9. Leadership skills

    Other skill domains could be elicited from the participants - brainstorm as needed.

## OVERVIEW

---

| | |
|---|---|
| COMPETENCY #3 | Follow-up of employees with educational and occupational training agencies to determine what clients did in seeking training and what was achieved. |

---

In this section the counselor needs to determine the best way to secure feedback from the educational and training agencies--what did the employer do? What needs to be improved?

## LEARNING EXPERIENCES

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OBJECTIVE: Identify employee behavior in securing specific educational/occupational training.

REVIEW: What basic information do we need about employee behavior after training recommendations are made?

ACTIVITY: Identify specific activities that should be conducted with student services offices of contracted educational institutions and training agencies. These activities should be those critical to get employees properly into programs, necessary paperwork performed, ongoing monitoring of employee (trainees) progress or problems, recommendations for supportive services and a general evaluation feedback on the whole program.

The following are some ideas that could be used by small groups to develop the "cardinal principles of employer and education EAP partnership".

### Sample Activities

1. Review program goals with agency.
2. Specify criteria for training placement success.

3. Identify procedures to collect information from the training site.
4. Does the existing EAP have a questionnaire to secure information from the training site?
5. Agree on a process of the agency reporting of each participant's complete training.
6. Does the educational agency have a process to provide training completion data and could it be used?
7. Review the employers specified criteria they use to assess the success of their EAP?

Using the following form, develop a more complete set of cardinal principles for developing an effective relationship with educational institutions and training agencies.

In the large group have each small group recorder describe their list and compare with others. This could result in a most complete set of operational principles.

## Cardinal Principles of Employers and Employee EAP Partnerships

| | Principle | Specific Techniques |
|---|---|---|
| 1. | | |
| 2. | | |
| 3. | | |
| 4. | | |
| 5. | | |
| 6. | | |
| 7. | | |
| 8. | | |
| 9. | | |
| 10. | | |

# APPENDIX A

## CONCEPTS AND EVALUATION PRACTICES

- Examine and review EAP program goals. The purpose of evaluation is to improve the program toward these ends. This step is the most critical since it sets the stage for subsequent ones. The purposes need to be clearly stated, and related questions need to be addressed: Who needs the data? What information is needed? How soon is it needed? Why do they need it?

- Identify criteria or measures of success. This assessment and counseling component should be examined individually. Establish criteria for evaluating how well each component contributes to program goals. For example:

  - Training. Is each training option recommended teaching up-to-date skills at sufficient skill levels and using training methods that are sound and motivational? Is the training program responsive to the client and employers' needs?

  - Pretraining counseling. Is pretraining counseling provided to those who need it when they need it? Are effective techniques used? Does counseling prepare individuals for the learning situation? Does it provide enough information on available support services and produce realistic expectations?

  - Job search assistance. Are suitable internal job openings described? Are transferable job improvement search skills taught? Are clients retained long enough with the employer to find a new job?

  - New Job--transfer--(placement). Do jobs match individual needs? Do referred individuals match employers' needs? Are "problem" placements avoided? Do clients and employers have realistic expectations of each other? What needs to be improved?

  - Job adjustment counseling. Are the clients who need counseling identified? Is the service provided when needed? Are real problems addressed? Is service provided in a time- and cost-efficient manner?

- Identify the kinds of information that can be obtained through interaction with employers and participants. The following example should be useful:

| Indicator | Possible Problem Areas Indicated |
|---|---|
| Employees not being placed into training? New jobs? | Training not providing sufficient skill levels, training being selected in non-demand jobs, or inappropriate corporate job opening projections being used. |
| Employer continued dissatisfaction with employee skills/productivity. | Out-of-date skills taught, training not providing sufficient skill levels, or inadequate communication with employers--why? |
| Employees quitting or being fired for nonskill-related reasons. Why? | Job transfer and adjustment counseling not provided when needed, inadequate employment orientation, or lack of ongoing employee assessment and counseling. |
| Dissatisfaction with dead-end jobs. Does new training bring new job improvement opportunities? | Inappropriate educational placements, inadequate skill training, or need for career progression counseling. |
| Individuals returning repeatedly for help with the same problems, with the same requests. | Client independence not fostered during support services delivery. |

Data collection design. Your data collection design should be responsive to these fundamental questions: How does one obtain the data? When will it be obtained? Who will collect it? Who will provide the data (respondents)? How long will it take to get it? How much will it cost?

- Determine means of transmitting feedback. Existing program structure and record keeping should be examined to determine the most effective methods of transmitting feedback. Attempt to use existing vehicles to minimize the time and effort required.

---

| | Goal |
|---|---|
| PREPARE CAREER GUIDANCE SPECIALISTS TO PLAN FOR PROGRAM OPERATIONS | After completing this module, the counselor will be able to develop their own customized recordkeeping, billing procedures, and contract specifications for their services if employed within an EAP program as a consultant. |

---

| | |
|---|---|
| Competency #1: | Develop an individual consulting record keeping system |
| Competency #2 | Develop an individual consulting billing system |
| Competency #3 | Develop an agreement or contract document that could be used with EAP consultancies |

---

In developing linkages with the corporate sector, counselors must provide explicit and systematic program operations that are cost effective. Also, EAPs require an analysis as it relates to the corporate investment in human resource development. The return on investment concept suggests to corporate planners a similar effort by service deliverers. Counselors who contract to deliver specialized services to employers must provide sound recordkeeping, billing, and specific work agreements.

This module is designed to assist counselors in designing, implementing, and conducting efficient consultant operations. A management approach provides systematic procedures operations--what records must be kept? What information do we need about program participants? Generally, a process related to program goals, objectives, and training activities is sufficient. Support services lend credence tot he effective operation of the training program. Client records indicate selection, participation, and completion of specific training through workshops, seminars or formal education programs. It is not unusual for employers (EAP) to reimburse trainees upon successful completion and also pay the provider when documentation is provided.

The standard format used in this and other modules for this program is as follows:

- About This Module: This section presents (1) the goal--a statement of what one should be able to accomplish by completing the module, and (2) an outline of the competencies thought to be most critical to achieving the goal.
- Overview: The overview offers an introduction to the topic and describes the purpose and content of the competency to be addressed.
- Learning Experiences: Each learning experience is designed to help users develop a specific competency. Within this section of the module are the following components:

  Objective: This statement describes the skills the trainee must be able to demonstrate at the conclusion of the learning experience.

  Review: This section includes individual exercises the trainees complete to demonstrate understanding of the competency. It also provides opportunities for immediate feedback regarding their understanding and progress.

  Activity: The activity is designed to engage the trainee in performing the tasks for which the competency is required. The suggested activities involve a blend of development, presentation, and "hands-on" participant activities, such as games and role playing.

  Checklist: The checklist is an itemized list of materials the trainee should have developed, acquired, and assembled through the learning experience.
- Evaluation: This section of each module contains information and instruments that can be used to measure what workshop particpants need prior to training and what they have accomplished as a result of training. Included in this section are a Pre- and Post-Participant Assessment Questionnaire and a Trainer's Assessment Questionnaire.
- References. All major sources that were used to develop the module are listed in this section. Also, major materials resources that relate to the competencies presented in the module are described and characterized.

## Competency #1 Develop an individual consulting record keeping system

This section of the module deals specifically with the development and use of a practical but effective record keeping system which would comply with all/most employer (EAP) requirements as they contract out for services.

Information about participant participation and completion of EAPs is essential to successful program operation. It also validates our work as a successful manager of programs services designed to assist employers with career transition and training concerns. The following provides some insights into ways of setting up a system.

### Establishing and Maintaining a Filing System

Information is a significant element in the operation of a EAP career guidance consultative support service. You'll acquire a variety of information about clients and their needs, opportunities, employers, support services available in your community, follow-through activities, and so on. The ability to efficiently classify and retrieve data will significantly influence the success of your service. Your filing system should be able to accommodate every kind of information so that it is accessible to staff.

Appendix A displays the major categories of information you are likely to deal with in support services.

Standardized forms will facilitate the use of your filing system. The following list of forms and their use may be helpful: participant needs assessment, employability development plan, competency records, and referral (to introduce participant to employers), employer data, employer's request of applicants, interview record, employer contact (between employer and client), and educational placement records. See Appendix B.

The formats that you select probably will be determined by the materials available or by the hardware of the existing filing system. If you produce your own forms, consider size--do they need to be standardized? spacing--is it sufficient? and instructions--are thy clear and complete? The routing and processing for all forms should be thoroughly understood by all relevant staff. Finally, clients should be assured of the confidentiality of information.

## Setting Up a Mechanized-Computerized Information System

If a manual system is unable to handle your information effectively, you may need to consider ways to replace or supplement it, and whether to computerize information storage. Before you purchase any computer hardware, software, or other storage devices, consult a knowledgeable person or agency. Your professional network is a good place to start. There might be the possibility of developing a joint venture operation with the local employer. Its possible that the computer capability in your agency or office might be compatible with that of the employer and EAP program. The issue here is that if the employer already has an established computerized system for employee data, the most efficient way of storing and reporting data is within the same hardware/software programs.

---

Objective: Systemize the record keeping and reporting system for efficient and acceptable feedback to employee, educational institution and employer.

---

Review: Participants should study Appendices A and B in respect to the module overview information. In preparation for large/small group discussion the following questions should be applied to each Appendix.

Appendix A - Categories of Information    Comments

1. Are there other categories that should be included?

2. Do you already have a client data recording system that could be used?

3. Could such a data format be handled on your personal computer?

4.

5.

6.

Appendix B - Suggested Forms for Employee Data and Educational Placement Information

1. What other data needs forms?

2. Do you need a form to record and report your time, task, cost information to the employer?

3. Should you systematically record all support service agency information as you use and evaluate their services?

4.

5.

Activity: The instructor should call the participants together and have them report their feelings and ideas regarding what they prepared during the review activity.

After general discussions the group could be broken down into three (3) groups. The first groups should develop a final list of data categories that should be contained in either a manual or computerized system.

Group two should focus on the development (or selection from other modules) forms needed to collect vital information.

Group three should discuss and develop recommendations for either a manual or automatic record keeping system.

As a summary activity the Trainer should have all three (3) groups report their findings and gain reactions from the full group.

Checklist: You should have the following:

o Personal reactions to Appendix A & B

o Copies of any final revisions or new forms developed by the large or small groups

o Notes generated from discussions for individual use

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## Competency #2: Develop an individual consulting billing system

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In this section your reporting system to corporate sponsors should be designed to provide evidence of program activities, costs tied to results. Data should be generated that provides specific cost information about services provided to each employee under contract.

Simply, you need to keep good fiscal records so that the following questions can be answered.

1. What is my agreed upon contract dollar value per specific client referred?
2. What is my time rate (hourly)?
3. Will you, or should you, have a performance cost arrangement or an hourly billing arrangement?
4. Does the employer demand billings with activity related cost factors?
5. What is the best form of billing (invoice, letter, form,)?
6. When should you bill?
7. How do you bill for non-personal time costs (tests, handouts, etc.)?

Review: Considering that you might have under contract a number of employee clients at any given time, what cost management factors do you need to consider? List in the following space (a) the ideas/methods that have worked for you and (b) what questions do you have about cost data and its reporting for payment?

## Management Factors to Consider

What has worked for you?

1. ______________________________

2. ______________________________

3. ______________________________

4. ______________________________

| Questions Needing Answers | Reason For Question |
|---|---|
| 1. ______________ | ______________ |
| 2. ______________ | ______________ |
| 3. ______________ | ______________ |

Activity #1: Instructor - In large group have individuals share with the group their ideas on billing procedures that have worked for them. Have someone recording an acceptable list of effective practices. When this is completed the instructors should field all the questions the participants have and attempt to answer each from the group input.

Activity #2: Have the group talk about how the consulting process would work if they were conducting services within their contract arrangement with their employing agencies, high school, community college or university.

Have the group examine Appendix C, "Assessment, Counseling, and training Agreement Form". Hopefully, at the end of the session, individuals will have a reworked form (Appendix C) that could be considered in their work setting. This is especially useful for those individuals who don't currently have such an agreement in force within their agency.

Activity #3: One of the possible cost factors within a consulting agreement might be travel and travel related expenses. Have the group examine and discuss Appendix F as a possible way to record and report travel expenses.

---

## Competency #3: Develop an individual agreement or contract that could be used with EAP consultancies.

---

Having a formalized agreement is critical to you as a consultant as well as the employer. Such an agreement specifies exactly what the employer is buying and what you as a consultant are selling and under what (time and cost) conditions.

It is important to develop an agreement or proposal for services that includes the following items:

- What will be done?
- Who will be assessed?
- Who will be counseled?
- Who will be trained?
- When will the activities occur?
- Where will the activities take place?
- What form will be used?
- What are consultant conditions?
- What services will the corporate sponsor provide?
- What services will the counselor provide?
- What will the program cost?
- How will you be reimbursed?
- Do you have your own employer's permission to serve?

In summary each counselor/consultant needs for professional, financial and legal purposes a means of documenting all the conditions of working with an employer.

Review: Participants should review individually Appendix E, Certification of Services, Appendix F, Agreement for Services, and Appendix G - Institutional Release to Provide Consulting Services, and prepare any concerns, ideas or recommendations on the concept, language, etc. Make your notes below.

Item General Comments

1. Certification of Services ______________________________

______________________________________________

______________________________________________

______________________________________________

2. Agreement of Services ______________________________

______________________________________________

______________________________________________

______________________________________________

3. Institutional Release ______________________________

______________________________________________

______________________________________________

______________________________________________

Activity #1: Using the notations from the individuals review activity, lead the large group in discussion and sharing on the issues of:

A. The pros and cons of providing EAP consultation as a private consultant or within their existing employment contract or an extended version to incorporate this "add on" work.

B. What documentation (agreements, etc.) is needed to protect (1) the individual counselor, (2) the educational institution, and (3) the employer?

C. How should one document services provided and at what cost?

Activity #2: Given the large group input, 1 - break the large group into three (3) small groups and assign each one of the three forms found in Appendices D, E, and F.

Instruct each group to adapt, modify, develop new, or agree on a form that one of the counselors are already using.

Activity #3: Call the small groups together and have each report and share the findings. Its expected that, as a result of the three activities, each counselor will take with them a specific example of forms that could be used within their institution and/or an arrangement with an employer.

Feedback:

- Sample agreement forms that could be used locally
- A general appreciation and understanding of the need for agreements and safeguards.

## Appendix A

### CATEGORIES OF INFORMATION KEPT ON FILE IN A SUPPORT SERVICES PROGRAM

- **Clients**
  - Clients' application materials, including resumes, references, and records of part- or full-time jobs
  - Training records and transcripts
  - Statistical data, including birth date, address, Social Security number, telephone number, and so forth
  - Records of employers each client has contacted
  - Test results and evaluations
- **Program operations**
  - Reports
  - Budget materials
  - Placements obtained
  - Employment referrals
  - Grants applied for and grants obtained
  - Recruitment and publicity materials
  - Program assessments, including strategies for program improvement
- **Support services**
  - Identified needs
  - Types available
  - Sources and providers
  - Interagency contacts
  - Evaluations by clients and employers
- **Employers**
  - Names, addresses, and phone numbers; names of contact persons
  - Types of jobs, descriptions and requirements
  - Local labor market information
  - Apprenticeship and job opportunities
  - Employer feedback
  - Evaluation of placement attempts

## Appendix B

## Suggested Forms Needed for Educational Placement Information

| Form | Purpose |
|---|---|
| Participant needs assessment | To find out training needs and opportunities |
| Participant job training placement plan | To record the planned and completed services |
| Participant competency records | To record skills learned |
| Participant support service referral form | To introduce participant to support services |
| Employer data (EAP) | To provide participants with information about employers EAP services and resources |
| Job transfer data | To record employer's request for employees to move positions within the corporation |
| Employee interview form | To record participant interviews with counselor |
| Employer contact form | To record participant contacts with various representatives of the corporation |
| Educational placement and achievement records | To record enrollments obtained, to review and evaluate their progress and changes. |

## Appendix C

## ASSESSMENT, COUNSELING AND TRAINING AGREEMENT FORM

PURPOSE: To provide a written document of mutual understanding on the part of industry and the training institution.

AGREEMENT: It is mutually agreed between the ______________________________ training institution and ________________________ industry located at ________________________, that

I. The training institution (public school named herein) agrees:

A. To pay salaries for instructional personnel not to exceed _____ per hour.

B. To _____ Not to _____ secure qualified personnel to conduct industrial training.

C. To secure a trainee affidavit from each student enrolled, stating his/her position in this training program. (Affidavit will be collected and filed by the training institution.)

D. To provide administrative supervision (institution employed) of instructional program.

E. To _____ Not to _____ furnish some _____ any _____ all _____ supplies for this training project. (NOTE: Specify.)

F. To _____ Not to _____ furnish some _____ any _____ all _____ equipment for this training project. (NOTE: Specify.)

G. To _____ Not to _____ furnish facilities for this training project.

H. To _____ Not to _____ advertise this training program.

I. To _____ Not to _____ renovate facilities for this training project.

J. To work jointly with the industry and employment agency in promotion of the training program and recruitment of suitable students.

K. To provide a top flight instructional program for the trainees.

L. To furnish the participating industry with rating sheets showing the trainees' progress, performance and personal adjustment.

M. To _____ Not to _____ furnish utilities for the training program.

N. To _____ Not to _____ install special machinery in training institution building.

O. To _____ Not to _____ place state and local equipment in in-plant training program. (NOTE: Specify and secure equipment agreement.)

P. To _____ Not to _____ provide a course curriculum for this project.

Q. To _____ Not to _____ develop a special course curriculum for this project.

## Appendix C - Continued

II. The industry (named herein) agrees:

A. To____Not to____furnish some____any____all____supplies for this training project. (NOTE: Specify.)

B. To____Not to____furnish some____any____all____equipment for this training project. (NOTE: Specify.)

C. To____Not to____furnish facilities for this training project. (NOTE: Specify.)

D. To permit and aid the training institution to conduct a follow-up study of individuals trained (October following FY trained).

E. To ensure that no product made during the training program will be entered into channels of commerce.

G. To assist in securing instructors for this training project.

H. To pay difference in salary necessary to secure qualified instructors. (NOTE: Specify.)

I. To provide for transportation of special equipment to be used in training.

J. To purchase any unused supplies at cost prices.

K. To provide equipment layout, suggested floor plan, and utility requirements.

L. To provide a qualified consultant.

M. To____Not to____provide instructors for the training project.

N. To permit the training institution and vocational division to use this program in advertising campaigns.

O. To give the training institution a letter stating the success or failure of this training program.

P. To provide the necessary paperwork for reimbursement, etc., required by the training institution.

Training Institution
Date:____________________ By:____________________

Industry
Date:____________________ By:____________________

---

SOURCE: *Developing Training Agreements*, n.d., pp. 23, 25, 27.

# Appendix D

[Contracting Agency - Data]

Institution Agreement Code ________

Date ________

## AGREEMENT FOR SERVICES
(Consultant or Institution)

TO: (Name of Counselor) ____________________

INSTITUTION: ____________________

SUBJECT: Contracted services for (Name of employee in program)

The (Industry name) proposes to enter into an agreement with you for your services to be performed as described below on the date(s) indicated.

Description of Services ____________________

Name of Employee(s) ____________________

Date(s) of Performance ____________________

Payment in the amount of $____________ will be made following completion of your services and receipt of your Certification of Services. You will be responsible for payment of such income tax as may be required since the sponsor will not withhold any amount for that purpose.

Reimbursement of travel expenses incurred in connection with the performance of your services is ( ) is not ( ) authorized. If authorized, reimbursement for such expenses will not exceed $__________ and payment will be based upon receipt of Consultant's Expense Report.

By signing this Agreement you represent that you will not be receiving a salary as a public employee during the time-frame indicated above. Furthermore, that you will keep in strict confidence all information on employees.

Your acceptance further certifies that this payment is for effort not performed during hours for which you will be receiving regular compensation for your primary employment. (If this effort is to be performed during hours for which you normally receive compensation for your primary employment, written authorization from your department head must be obtained prior to the commencement of your services.)

If the provisions and terms of this Agreement are acceptable to you, please sign, date, and include your Social Security Number on both the original and the copy of this form, send the original to the Program Director at ____________________ and retain the copy for your records.

OFFERED: ____________________ DATE: ____________________

ACCEPTED: ____________________ SOCIAL SECURITY NO. ______________

# Appendix E

[Contracting Firm Data]

## CERTIFICATION OF SERVICES

CONSULTANTS: COMPLETE THIS BLOCK ONLY

Submit two copies to Sponsoring Agency Project Director.

This is to certify that I have performed the services described below in connection with

______________________, Employee Assistance Program.
(sponsoring firm)

Name of Employee Served ______________________

at (location): ______________________

on (dates) ______________________

DESCRIPTION OF SERVICES: Actual Dates Worked ______________________

Rate ______________________

Name: ______________________ Soc. Sec. No.: ______________
Counselor

Home Address: ______________________
Street City State Zip

Signed: ______________________
Date

(TO BE COMPLETED BY PROJECT DIRECTOR)

P.O. No. ________ Project No. ________ Total Amount $________

Approved: ______________________
Project Director Date

## Appendix F

# EMPLOYEE ASSISTANCE - COUNSELING PROGRAM
# TRAVEL - LOCAL MILEAGE
## (MONTHLY)

NAME

SOCIAL SECURITY NO.

INSTITUTION AGREEMENT

ADDRESS OF PERMANENT WORK STATION

CITY

STATE

ZIP CODE

| Date of Travel | From (Origin) | To (Destination) | Purpose of Trip | Mileage (in tenths) |
|---|---|---|---|---|
| | | | | |
| | | | Total Miles | |

Traveler's Signature

Date Submitted

## Appendix G

### Institutional Release to Provide Outside Contract Services to Employers

Employees (counselors) who retain full-time employment with a specific educational or human service agency will need to report, and at times gain permission to perform, such activity to their supervisor. Typically, the report covers:

Outside Professional Service Report

I. Date__________ Name______________________________

Counselor

Title______________________________

Department or Unit______________________________

Description of Activity and Name of Employer_______________

____________________________________________________

____________________________________________________

Dates of Service_______________Time Per Month____________

(Days/Hours)

II. I'll use institutional facilities equipment, etc. in performing these services ____________Yes ____________No

If yes - the following are the items I'll be using:

_____Equipment (Description)__________________________

____________________________________________________

_____Facilities (Description)__________________________

____________________________________________________

_____Other (Description)

1. ________________________________________________
2. ________________________________________________
3. ________________________________________________
4. ________________________________________________

III. I have made arrangements with the ______________________________ to pay the institution for any costs incurred in using the items in II above.

Yes______________ No________________

IV. The benefits to the institution directly or indirectly from my consulting arrangements would be:

1. ____________________________________________________________
2. ____________________________________________________________
3. ____________________________________________________________
4. ____________________________________________________________

Career Guidance Specialist__________________________Date____________
Signature

Supervisor__________________________________________Date____________
Signature